

A construction worker wearing a blue hard hat and a high-visibility yellow and orange vest is working on a steel rebar structure. The worker is smiling and looking down at their work. The background shows a complex network of steel beams and rebar.

# TENNESSEE'S ECONOMY

2023-2024



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**Labor & Workforce  
Development**

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# Executive Summary

The Tennessee's Economy 2023-2024 discusses the growth of the Tennessee and local economies during the past year as well as providing data on historic growth trends. In addition, the report highlights seven top industry sectors in the state, explores current and emerging trends, and focuses on factors affecting the labor force participation rate. Several collaborative initiatives being taken by the public and private sectors to increase the labor force participation rate and reduce Tennessee's significant barriers to employment are highlighted, as well as continuing challenges.

## Tennessee Employment 2022-2023

Tennessee's annual average nonfarm employment in 2022-2023 increased by 1.8 percent, creating more than 57,000 jobs. Private service-providing jobs increased by 1.9 percent, while goods-producing jobs increased by 1.2 percent, led by a more than four percent increase in construction and related jobs. Since 2018, employment in Tennessee has increased by 234,400 jobs, growing at an overall rate of 7.6 percent. Total employment in the state, including agricultural, self-employed, and private household workers, is expected to grow to 3.9 million in 2032, increasing an average of 1.3 percent annually from 2022. Healthcare support as well as computer and mathematical occupations are the occupational groups expected to show the largest yearly growth through 2032. Although office and administrative support occupations are expected to have the most employment by 2032, they will be the slowest-growing group, with technological change being an important factor. Top advertised job certifications are primarily related to health and social worker occupations. Tennessee's unemployment rate has been trending downward; in June 2024, the seasonally adjusted rate was 3 percent, lower than the 3.6 percent rate in June 2023. In contrast, the U.S. rate was 4.1 percent in June 2024.

Median hourly wage growth increased an average of 9.7 percent over the year, from \$19.20 to \$21.07 in 2023. Median wages increased for all 22 major occupational groups.

The previous Tennessee's Economy report identified seven top industry sectors in Tennessee based on employment size, jobs added, and/or higher rates of growth, including:

- Leisure and hospitality
- Health care and social assistance
- Manufacturing

- Transportation, warehousing, and utilities
- Professional, scientific, and technical services
- Mining, logging, and construction
- Information

Leisure and hospitality was the second most rapidly- growing industry during 2022-2023. The private health care and social assistance sector had the most rapid growth rate (4.9 percent) during that period. Mining, logging, and construction was the third most rapidly- growing industry sector, with construction expanding in the industrial, utility, and residential areas.

Over the five-year period from 2018 to 2023, manufacturing, the fourth largest industry sector after government, grew 3.7 percent, in contrast to its national performance. Also from 2018 to 2023, transportation, warehousing, and utilities added more than 34,000 jobs; professional, scientific, and technical services added 33,000 jobs; and information added more than 10,000 jobs, increasing in employment at nearly three times the state rate at 22.5 percent.

Detailed analysis on the advanced manufacturing and energy, health care and social assistance, construction, and information sectors follows.

- The Advanced Energy Workforce and Emerging Industries

Industry developments in the advanced manufacturing and advanced energy clusters have been driving employment and training opportunities in the state. Advanced manufacturing investment includes the production of electric vehicles, batteries, and other auto parts, electric charging stations (production, installation, and maintenance), electric vehicle repair, and training facilities to teach the skills needed to put and keep the vehicles on the road. From 2015 to 2023, Tennessee was one of the top 10 states for investment in electric vehicles, electric batteries, and battery components.

Although purchases of EV vehicles have increased, with Volkswagen sales in the U.S. up 12 percent in the first six months of 2024 and 15 of 18 EV models available since January of 2023 increasing sales notably over the last year, the pace of investments has slowed. Factors have included high vehicle costs, slower installation of charging stations, range anxiety, and lack of consumer knowledge on EV charging. Ford has announced a delay of at least a year in EV truck production in Tennessee, moving into more hybrid-electric versions of SUVs, and new plans for smaller EVs, aligning more with expected consumer preferences. The workforce system, including partnerships of employers and educators, has responded strongly to the need for advanced skill training, while supporting flexibility by including training for both current and new skills.

Energy efficiency is the largest employment in the energy sector nationally; this includes

constructing, manufacturing, and installing energy efficient appliances, heat pumps, lighting, and building materials. Through the Infrastructure Investment and Jobs Act (2021) and the Inflation Reduction Act (2022) the Tennessee Department of Environment and Conservation (TDEC) has applied for several grants relating to workforce development. A Solar for All grant was awarded; other grants may include energy auditor and residential energy contractor training, with the potential for development of apprenticeships.

- Advanced Energy Innovation in the Electric Utility Sector

The electric utility sector connects many sectors of our communities- housing, transportation, communication, industrial development, and many others which require energy to operate. Advanced energy requires an interdisciplinary workforce and a wide variety of system components, in this state largely developed by or in association with the Tennessee Valley Authority (TVA). The energy economy of the future is expected to include the clean energy components of renewable energy including wind and solar, advanced nuclear, more cybersecurity, artificial intelligence powered within data centers, and other advanced technologies, creating a range of workforce requirements depending on the pace of change.

- The Health Care and Social Assistance Workforce

In the largest industry sector in the state, in the fourth quarter of 2023, there were an average of 449,826 health care and social assistance workers in Tennessee, with 39 percent working in ambulatory care services and almost 35 percent working in hospitals; others worked in nursing and residential care facilities and social assistance agencies. Half of the employees worked in the Northern Middle and Greater Memphis LWDAs combined. The 2024 Academic Supply and Occupational Demand publication identified eight occupations found to be in demand in seven or more LWDAs: occupational safety and health specialists, speech-language pathologists, pharmacy technicians, licensed practical nurses, physical therapy assistants, medical assistants, and phlebotomists, with persistent shortages of registered nurses, mental health and medical laboratory personnel. With Tennessee having one of the lowest life expectancies in the country, filling more positions with trained personnel and expanding access to services is critical. The innovative Vanderbilt- Metro Nashville Public Schools Partnership provides a model.

- The Construction Workforce

An average of 161,408 workers were the number employed in the construction industry in Tennessee during the last quarter of 2023, engaged in industrial, commercial, and residential projects around the state. More than half of the construction workforce is currently employed in the Northern Middle and East Tennessee LWDAs combined. The Academic Supply for Occupational Demand Report in 2024 identified nine occupations in demand in more than six LWDAs in the state, including painters; heating, air conditioning and refrigeration installers and

mechanics (HVAC); plumbers, pipefitters, and steamfitters; construction and building inspectors; electricians; operating engineers; carpenters; and construction managers. Significant numbers of apprenticeship completers help to alleviate these shortages; however, even more workers are needed, especially for HVAC and even construction managers. 603 electricians completed apprenticeship and certificate programs in 2022, compared to an expected 1,892 annual openings. One model of an integrated workforce partnership is the Titans Construction Training Camp, established with the Tennessee Department of Labor and Workforce Development (TDLWD) and the Tennessee Builders Alliance (TBA) to enable paid employment and the attainment of stackable certificates with support services for youth, including justice-involved individuals.

- The Digital Technology and Communications Workforce

The state had 51,056 employees in the information industry in the fourth quarter of 2023, working in nearly 9,600 establishments. More than half of employees in information technology firms were employed in the Northern Middle LWDA. In the Academic Supply for Occupational Demand Report (2024) the most in-demand IT occupations were identified as computer network support specialists, computer systems analysts, information security analysts, and software developers. High rates of employment were also found for medical informatics and certificate programs for information security analysts and computer systems networking and telecommunications. Identification of the variety of barriers to employment for potential tech workers seeking to train for the xAI project in Memphis have included lack of secondary tech training, academic remediation, childcare, transportation, and other resources. The State of Tennessee created a Grow Your Own program to assist with recruitment and retention of digital technology workers.

## Occupations in Demand by LWDAs

For additional data on the occupations in demand in Tennessee, regions, and the LWDAs, please access the Program Providers for Demand Occupations dashboard (see link below).

- Program Providers for Demand Occupations  
[https://data.tn.gov/t/Public/views/TennesseeProvidersforDemandOccupations/TennesseeProvidersforDemandOccupations?%3AshowAppBanner=false&%3Adisplay\\_count=n&%3AshowVizHome=n&%3Aorigin=viz\\_share\\_link&%3Atoolbar=yes&%3Aembed=yes](https://data.tn.gov/t/Public/views/TennesseeProvidersforDemandOccupations/TennesseeProvidersforDemandOccupations?%3AshowAppBanner=false&%3Adisplay_count=n&%3AshowVizHome=n&%3Aorigin=viz_share_link&%3Atoolbar=yes&%3Aembed=yes)

## Labor Force Participation Rates

Whereas Tennessee's unemployment rate from September 2022 to June 2024 has only exceeded the U.S. rate in one month (January 2023), the labor force participation rate (LFPR) in the state remained lower than the U.S. during that entire time. In June 2024 the state rate (LFPR) was 59.9 percent, in contrast to the U.S. rate of 63. The governor's priority is to raise the Tennessee LFPR to 63 percent by June 2025. Currently the Northern Middle LWDA at 67.2 percent is the only LWDA

with a LFPR higher than the national rate.

National studies point to several factors which could affect the U.S. LFPR and which could be relevant for the state as well. The aging of the population, with a smaller proportion in the prime working age group, can reduce the LFPR, but measures taken by other industrialized nations have lessened the impact of this trend. Prime age working women had the highest LFPR rate ever in 2023. Lack of daycare resources, its high costs and pay inequities are factors starting to dampen participation of mothers with young children in 2024. Increasing educational attainment of low-income people, especially women, has one of the strongest effects on LFPRs. An even greater positive effect on LFPRs has been found from improving health and integrating those with health limitations into the labor market, including the promotion of vocational rehabilitation policies and employer early intervention, which countries have successfully used to increase LFPRs. The opioid crisis has increased mortality rates for males ages 45-54; but extending health insurance to low-income families has increased LFPRs. Also, immigration (generally younger individuals) has had a positive effect on LFPRs.

## West Region's Economy and Labor Force

The West Region consists of three Local Workforce Development Areas (LWDAs)- Greater Memphis, Southwest, and Northwest, encompassing 21 counties (see Appendix). Total employment in the West Region decreased from 702,007 to 701,393, a decrease of 0.1 percent, according to annual average data for 2022 and 2023 based on place of work. This is the only region where employment declined from 2022 to 2023. The Jackson MSA did increase in employment, but employment in the Memphis MSA declined by 2,500 jobs to 659,100. The average annual unemployment rate in the region decreased from 4.2 to 4.1 in 2023, as did youth unemployment in 2021-2022, but they were still above the state average rates.

On a positive note, the annual average industry wage (total payroll divided by the number of employees) increased to \$63,580 as the total payroll increased from \$43.1 billion to \$44.6 billion from 2022 to 2023. The median occupational wage also increased to \$43,080. The five largest industry sectors were health care and social assistance, transportation and warehousing, retail, manufacturing, and educational services. The industries adding the most jobs from 2018 to 2023 were health care and social assistance (more than 11,000 new jobs), transportation and warehousing (9,100 new jobs), and construction (3,700 new jobs).

The largest occupational group in 2023 was transportation and material moving occupations, with over 100,000 workers. Employment in this industry declined slightly from 2015 to 2023, as did sales and production occupations. The occupations gaining the most jobs were business and financial operations, construction, management, and protective services.

The West Region lost population from 2022 to 2023 (-4,341), due primarily due to a population

decline in Greater Memphis. However, significant improvements in the labor force participation rates were made by the Southwest and Greater Memphis LWDAs, bringing the region closer to the state rate. The percentage of the population aged 25 or more with some college or higher educational attainment in the West Region was 10 percentage points lower than the state (47.7 vs. 57.8); this is reflected in the poverty rates in the LWDAs being higher than for the state. Reducing poverty and increasing educational attainment remain key targets of workforce policy in the region.

About 27 percent of state disadvantaged youth and adults are in the West Region, and 30 percent of single parent families, yet surprisingly few are timing out of TANF. There are more than 15,000 probationers and parolees, but very few participants in recovery courts or mental health courts.

## Middle Region's Economy and Labor Force

The Middle Region is composed of three LWDAs- Northern Middle, Southern Middle, and Upper Cumberland- encompassing 40 counties (see Appendix). From 2022 to 2023, total employment increased by 3.3 percent, from 1,325,718 to 1,369,675. This increase in employment was fueled by the Clarksville- Hopkinsville TN-KY MSA growing by 2.5 percent and the Nashville MSA by 2.9 percent; these two MSAs together added a total of 35,400 jobs. The average annual unemployment rate in the region decreased from 3.0 to 2.9 percent, lower than the state rate; youth unemployment decreased to 8.43 percent.

The annual average industry wage (total payroll divided by the number of employees) increased to \$66,717, a 21 percent increase from the previous year. The median occupational wage also increased to \$45,406, a 9.3 percent nominal increase over the year. The five largest industry sectors were health care and social assistance, retail trade, manufacturing, accommodation and food services, and educational services. The industries adding the most jobs from 2018 to 2023 were transportation and warehousing (20,281); professional, scientific, and technical services (15,217), construction (15,033), and health care and social assistance (13,700).

The largest occupational group in 2023 was transportation and material moving occupations, with 153,600 workers. More than 60,000 jobs have been added since 2015. Other occupational groups gaining the most jobs were business and financial services, management, food preparation and serving-related, and healthcare practitioners and technical. Job losses of 1,000 or more employees since 2015 took place in architecture and engineering, production, and office and administrative services.

The Middle Region lost 11,027 people from 2022 to 2023. Population gains took place in the Southern Middle (7,887) and Upper Cumberland (6,250) LWDAs, while the Northern Middle LWDA lost 25,164 in population. Some of the population gains in the Upper Cumberland and Southern Middle LWDAs were probably those relocating from Northern Middle, but the area overall suffered a population loss. Labor force participation rates declined slightly in all three LWDAs over the year

and for the region; LFPRs in the Northern Middle LWDA (66.8) topped that of the state, while rates in the other two LWDAs were below the state average.

Educational attainment including some college or more for those ages 25 and up was about 10 percent higher than the state in the Northern Middle LWDA (67 percent), with Southern Middle and Upper Cumberland nine or more percentage points below the state rate. Consequently, although poverty rates in the Middle Region were lower than the state's 14 percent due to lower rates in the Northern Middle LWDA, the Upper Cumberland poverty rate exceeded the state's. Educational attainment at the bachelor's level or above was highest for Black and Hispanic individuals in the Middle Region.

About 35 percent of state disadvantaged youth and adults are in the Middle Region, and about the same percentage of the individuals in poverty across the state, making poverty reduction a key priority for this LWDA. More than 40 percent of youth aging out of foster care are also in this region, as are 40 percent of the state's veterans' population, due to proximity to Fort Campbell.

## **East Region's Economy and Labor Force**

Total employment in the East Region over the year increased from 1,031,985 to 1,055,216, a rate of 2.2 percent or 22, 231 jobs. Rapid employment growth in the Chattanooga MSA (4.2 percent) as well as steady growth in the Knoxville MSA (1.8) and the Kingsport-Bristol TN-VA MSA (1.6 percent) fueled the regional growth trend. Three LWDAs are included in the East Region: East Tennessee, Northeast, and Southeast, including 34 counties (see Appendix).

The annual average industry wage (total payroll divided by the number of employees) increased to \$58,545 as the total payroll increased from \$58.1 billion to \$61.8 billion from 2022 to 2023. The five largest industry sectors in 2023 were manufacturing, health care and social assistance, retail trade, accommodation and food services, and educational services. The industries adding the most workers from 2018 to 2023 were manufacturing (10,265 new jobs) and professional, scientific, and technical services (7,901 new jobs), with the health care and social assistance industry finally showing growth over the half-decade.

The largest occupational group in 2023 was the office and administrative support group, although it lost more than 16,000 jobs since 2015, aligning with national trends as the use of technology in the workplace increased. Transportation and material moving occupations, food preparation and serving, and production occupations were the next largest groups; all increased in employment since 2015, with production adding 10,660 jobs. Top employer job postings in the region in 2023 were the hospitals and health care systems, food services, and Oak Ridge National Laboratories.

The East Region gained 33,809 in population from 2022 to 2023, with population increases in all three LWDAs. Labor force participation rates decreased slightly in each LWDA, but the overall LFPR remained the same, about three percentage points lower than the state. The average

regional unemployment rate was consistent in the region from 2022 to 2023 (3.4 percent), just one percentage point above the state rate. Youth unemployment decreased in the region. The educational attainment rate for some college or higher for those in the East Tennessee LWDA (58.5) for adults 25 and over topped that of the state; the other two LWDA had rates below the state. The educational attainment rates of bachelor's degrees or higher for the population age 25 or more were lower than state rates for White, Black, and Hispanics.

On a positive note, the poverty rate displayed a significant decrease in 2022 for the East Region. All LWDA were had lower rates than the state rate of 14 percent, with the Northeast LWDA having the highest rate and the lowest rate of educational attainment of the population having some college or more education. Notably, the Southeast poverty rate decreased from 18.82 percent to 11.46 percent while the Chattanooga MSA employment grew more than four percent. Rates of those with disabilities remained higher than the state, possibly because of the effects of the opioid crisis in the region.

Significant barriers to employment include fewer parolees and probationers in 2023 but a larger number of individuals in the jail population in 2024 than in 2023. This region includes 29 percent of those in poverty, 37 percent of disadvantaged youth and adults, 40 percent of those with disabilities, and 35 percent of those 20-24 years old.

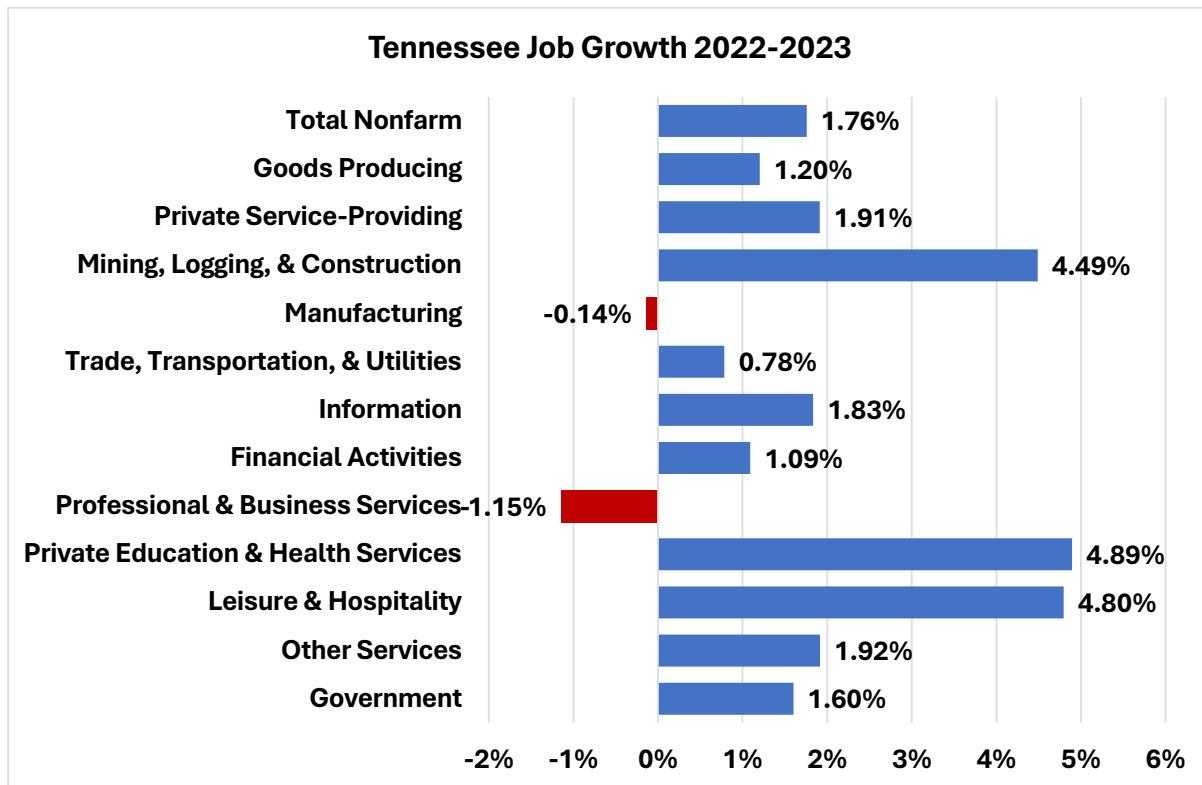
## **Apprenticeships**

The number of apprenticeship completers has been steadily increasing since 2019 when the apprenticeship office was established in TDLWD: from 2020 (981) to 2023 (1,174). The West Region added 45 more completers over the year. The variety of apprenticeships is also greater, with 86 different programs with apprenticeship completers in 2023. The sponsors and the number of completers in each region and LWDA are shown in this section.

The top occupations for apprenticeship completers in 2023 were electricians, pipe fitters (construction), chemical operators, sheet metal workers, and carpenters. Several new programs with more than five completers in 2023 included two in medical, two in computer science, and several in production and building maintenance occupations.

# Tennessee Employment 2023

Based on place of employment, Tennessee's annual average nonfarm employment increased by 1.76 percent from 2022 to 2023. Goods-producing jobs increased at a rate of 1.2 percent compared to 1.91 percent for private service-providing jobs. This represented a significant difference from the prior year when those sectors grew by 4.5% and 2.4% respectively. Jobs in the government sector grew by 1.60 percent.



Source: TDLWD, WIRED Division, Current Employment Statistics

Figure 1.

Tennessee's Economy 2022-2023 identified seven industry sectors as the top industries in Tennessee, based on size, jobs added, and/or higher rates of growth. These included:

- Leisure and hospitality
- Health care and social assistance
- Manufacturing
- Transportation, warehousing, and utilities
- Professional, scientific, and technical services
- Construction and
- Information

Within the **leisure and hospitality sector**, accommodation and food services was one of the top five industries adding the most jobs in 2018-2023; the arts, entertainment, and recreation industry grew more than twice as fast as the state average growth rate of 7.6 percent. Leisure and hospitality continued its growth as the second-fastest growing industry in 2022-2023.

The **private health care and social assistance sector**, as one of the largest industries in the state, was among the top five in job creation, adding more than 27,000 jobs during this half decade. It was the sector with the most rapid growth rate (4.9 percent) from 2022-2023.

**Manufacturing**, the fourth largest industry sector (excluding government), lost about 500 jobs in 2022-2023, but had 3.7 percent growth over the five-year period, in contrast to its performance at the national level. Investments in green energy have spurred the advanced manufacturing sector, especially the durable goods industry.

**Transportation, warehousing, and utilities** was one of the top-growing industries over the half decade, adding more than 34,000 jobs and growing nearly three times as fast as the average for the state. Changes in consumer purchasing patterns towards e-commerce during the pandemic spurred the warehousing and transportation sectors to significant growth; in contrast, retail trade grew at only half the rate of overall growth.

**Professional, scientific, and technical services** grew three times as fast as overall job growth, adding more than 33,000 jobs during the half decade. This is the fastest-growing sector of professional and business services, which also contains the administrative and support and waste management sectors, which declined during 2018-2023, causing professional and business services to also decline in 2022-2023.

The mining, logging, and construction industry was also one of the top job creators, adding more than 29,000 jobs and growing nearly three times as fast as overall growth. This fast pace continued in 2022-2023 as it had the third most rapid growth among industry sectors in the state, due to growth in the industrial, utility, and residential areas. This sustained rate of growth has strained workforce resources, causing shortages of workers and the need for broader workforce development.

**Table 1. Tennessee Industry Employment, 2018-2023**

Industry Employment (in thousands)	2018	2022	2023	2022-2023		2018-2023	
<b>Total Nonfarm</b>	3073.7	3250.9	3308.1	57.2	1.8%	234.4	7.6%
<b>Goods Producing</b>	480.1	515.9	522.1	6.2	1.2%	42.0	8.7%
<b>Mining, Logging, &amp; Construction</b>	129.1	151.5	158.3	6.8	4.5%	29.2	22.6%
<b>Manufacturing</b>	351.0	364.4	363.9	-0.5	-0.1%	12.9	3.7%
<b>Durable Goods Manuf.</b>	224.2	232.6	233.1	0.5	0.2%	8.9	4.0%
<b>Non Durable Goods Manufacturing</b>	126.7	131.8	130.8	-1.0	-0.8%	4.1	3.2%
<b>Private Service-Providing</b>	2157.8	2297.9	2341.8	43.9	1.9%	184.0	8.5%
<b>Trade, Transportation, &amp; Utilities</b>	623.5	676.3	681.6	5.3	0.8%	58.1	9.3%
<b>Wholesale Trade</b>	120.4	128.8	134.2	5.4	4.2%	13.8	11.5%
<b>Retail Trade</b>	333.1	341.2	343.2	2.0	0.6%	10.1	3.0%
<b>Transportation, Warehousing, &amp; Utilities</b>	170.0	206.3	204.3	-2.0	-1.0%	34.3	20.2%
<b>Information</b>	45.3	54.5	55.5	1.0	1.8%	10.2	22.5%
<b>Financial Activities</b>	174.7	183.5	185.5	2.0	1.1%	10.8	6.2%
<b>Finance &amp; Insurance</b>	134.1	140.6	141.6	1.0	0.7%	7.5	5.6%
<b>Real Estate &amp; Rental &amp; Leasing</b>	40.6	42.9	44.0	1.1	2.6%	3.4	8.4%
<b>Professional &amp; Business Services</b>	418.0	462.8	457.5	-5.3	-1.1%	39.5	9.4%
<b>Professional, Scientific &amp; Technical Services</b>	141.2	170.0	174.5	4.5	2.6%	33.3	23.6%
<b>Management of Companies &amp; Enterprises</b>	49.0	54.2	56.3	2.1	3.9%	7.3	14.9%
<b>Administrative &amp; Support &amp; Waste Mgt &amp; Remediation Services</b>	227.9	238.6	226.7	-11.9	-5.0%	-1.2	-0.5%
<b>Private Education &amp; Health Services</b>	440.1	451.5	473.6	22.1	4.9%	33.5	7.6%
<b>Private Educational Services</b>	61.0	64.6	67.3	2.7	4.2%	6.3	10.3%
<b>Health Care &amp; Social Assistance</b>	379.0	387.0	406.3	19.3	5.0%	27.3	7.2%
<b>Leisure &amp; Hospitality</b>	337.9	344.1	360.6	16.5	4.8%	22.7	6.7%
<b>Arts, Entertainment &amp; Recreation</b>	40.0	43.5	47.3	3.8	8.7%	7.3	18.3%
<b>Accommodation &amp; Food Services</b>	298.0	300.6	313.2	12.6	4.2%	15.2	5.1%
<b>Other Services</b>	118.2	125.2	127.6	2.4	1.9%	9.4	8.0%
<b>Government</b>	435.8	437.1	444.1	7.0	1.6%	8.3	1.9%
<b>Federal Government</b>	49.1	52.4	55.7	3.3	6.3%	6.6	13.4%
<b>State Government</b>	99.0	94.8	96.9	2.1	2.2%	-2.1	-2.1%
<b>Local Government</b>	287.6	289.9	291.5	1.6	0.6%	3.9	1.4%

Source: TDLWD, WIRED Division, Current Employment Statistics

The **information**, or digital technology, sector was a top growth industry at 22.5 percent, increasing in employment at nearly three times the state rate over the five years ending in 2023. Over the last year its growth slowed to about the same pace as overall growth in the Tennessee economy, with digital technology jobs spreading throughout most industries in the state.

The following sections highlight workforce issues related to several of these top industries.

## Tennessee's Advanced Energy Workforce and Emerging Industries

A variety of industry developments in the advanced manufacturing and advanced energy clusters are driving employment and training opportunities in Tennessee. The advanced manufacturing investment includes the production of electric vehicles, batteries, and other auto parts, electric charging stations (production, installation, and maintenance), electric vehicle repair, and training facilities to teach the skills needed to put and keep the vehicles on the road.

In March 2023 it was reported that Tennessee was one of the top 10 states for investment in electric vehicles, electric batteries, and battery components from 2015 to 2023.<sup>1</sup> Since 2019, the Tennessee Department of Economic and Community Development (TNECD) said that investments of nearly \$15 billion have been made by companies in Tennessee through EV-related projects, creating close to 11,000 new jobs.<sup>2</sup>

Although for the 15 of 18 EV models available since January 2023, over the last year purchases are up 73%, the pace of investments have slowed somewhat due to the higher costs of electric vehicles, the slower installation of public electric vehicle charging stations, range anxiety, and lack of consumer education on how to use and charge the vehicles.<sup>3</sup> Auto manufacturers are responding to some of these concerns by planning to expand the production of hybrid vehicles and researching the potential for lower-cost models. The state has \$88 million to implement fast charging in the state. The goal is to have fast chargers every 50 miles along the interstates and Highway 64. As with any new technology, adaption takes time and consumer education.

What has been the response of the workforce system to these new challenges? The response has been vibrant by both employers and educators, from developing new partnerships to new training programs to new institutions as learning academies for both students, teachers, and the community.

Partnerships: Since the technologies are new, and new production processes are being developed, economic and community development staff are meeting with manufacturers to identify their skill needs.<sup>4</sup> They are also working with current companies that are gas engine parts manufacturers to incentivize them to retrain their employees. The rapid pace of technological change requires interdisciplinary work and collaboration is essential.<sup>5</sup>

New Programs: In response to employer needs, a new degree program for EV has been developed including education on charging stations and mechatronics at Motlow State Community College<sup>6</sup>; an TCAT automotive technician program at Chattanooga State Community College from which individuals can transfer to an associate's degree in electrical engineering, focused on EV manufacture and repair<sup>7</sup>; and a new TCAT, opened in June 2024, was constructed in Stanton at the Blue Oval site to train individuals in skills needed to work at the EV auto manufacturing and battery plants. Existing programs in industrial electricity, mechatronics, and cybersecurity are important for EV and charging station production and maintenance. Locations of these programs can be found on the Program Providers for Demand Occupations dashboard [https://data.tn.gov/t/Public/views/TennesseeProvidersforDemandOccupations/TennesseeProvidersforDemandOccupations?%3AshowAppBanner=false&%3Adisplay\\_count=n&%3AshowVizHome=n&%3Aorigin=viz\\_share\\_link&%3Atoolbar=yes&%3Aembed=yes](https://data.tn.gov/t/Public/views/TennesseeProvidersforDemandOccupations/TennesseeProvidersforDemandOccupations?%3AshowAppBanner=false&%3Adisplay_count=n&%3AshowVizHome=n&%3Aorigin=viz_share_link&%3Atoolbar=yes&%3Aembed=yes)

Employer Training: Volkswagen has an academy in Chattanooga with Chattanooga State Community College which offers the electrical engineering associate's degree. Nissan has an internal Nissan University with college and EV technology training and is also establishing Centers of Excellence at Tullahoma and the Franklin, Giles, and Warren County High Schools<sup>8</sup> ([vimeo.com/930267326](https://vimeo.com/930267326)) for which they are paying the instructors. They also are sponsoring work-based learning programs. Apprenticeships could be developed.

Workforce and training challenges include program labeling and scope (including current and new technologies for greater employment opportunities), accessibility to training sites including for urban populations, determining alignment of military positions with EV, and outreach to those in adult education programs including the justice-involved (Ashford, Rich). At the same time, opportunities are expansive with \$16 billion in grants available with a focus on equity and economic development (Millican). Better methods for community education on EVs and the use of charging stations, as well as advances in battery technology (faster chargers, new materials, greater range), will support wider acceptance of the technology.

## Advanced - Energy Related Grants

A study released in October 2023 reported that Tennessee had the most rapidly-growing clean energy workforce in the country in 2022. The largest employment in the energy sector nationally is energy efficiency, including constructing, manufacturing, and installing energy-efficient appliances, heat pumps, lighting, and building materials.

Advanced- Energy Related Grants: Passage of the Infrastructure Investment and Jobs Act (2021) and the Inflation Reduction Act (2022) provided the Tennessee Department of Environment and Conservation (TDEC) the opportunity to apply for several grants. These grants may result in funding for workforce development opportunities in 2024 and beyond, which could include the

development of apprenticeships. These include:

- Solar for All- this grant was approved by the EPA in April 2024. TDEC will begin a planning year in September 2024 to define the program workplan and budget. TDEC is designing workforce training that will prepare individuals from low-income and disadvantaged communities for middle-class career pathways in solar energy deployment.
- Three other grants have been submitted, including Training for Residential Energy Contractors, Residential Energy Auditor Training, and Commercial Energy Auditor Training. TDEC is waiting for approval from the U.S. Department of Energy.
- TDEC will consider applying for a competitive grant for Training for Residential Energy Contractors. If the decision is made to apply to this grant, the due date is January 15, 2025.

The Training for Residential Energy Contractors and Energy Auditor Training grants will provide funding for state energy offices to train, test, and certify residential energy efficiency and electrification contractors and train individuals to conduct energy audits of commercial and residential buildings. TDEC has consulted with the Department of Labor and Workforce Development on these grants; the Deputy Commissioner of TDLWD serves on the TDEC Workforce Advisory Group that will begin further consultations on workforce issues and training opportunities when additional grants are approved.

In addition, school districts have applied for grants for electric and propane school buses, which if awarded will provide the opportunity for school district employees to learn maintenance skills for these buses. Federal and state funds are available for these competitive grants. Grants should include a plan to create good jobs (as defined by the US DOL ETA's eight recently released criteria), providing stable employment and a livable wage. The website Green Workforce Connect <https://www.greenworkforceconnect.org/> will assist grantees in implementing energy auditor and other clean energy grants received.

## **Advanced - Energy Innovation in the Electric Utility Sector**

The interdisciplinary and interconnected nature of advanced energy is nowhere more evident than in the electric utility sector, which connects the housing, transportation, communication, industrial development, and many other sectors of our communities which require energy to operate.

The Advanced Career Cluster organization has added an Energy cluster to its classification of educational programs of study. Tennessee is within the seven-state Tennessee Valley Authority (TVA) system, the largest public power provider in the United States, containing the third largest nuclear fleet in the country and with 99.99 percent electric reliability since 2000. The Tennessee Advanced Energy Business Council (TAEBC) promotes innovation, education, and opportunity in this sector, promoting partnerships and venture funding across numerous related industries.

Dr. Joe Hoagland, Vice President of Innovation and Research at TVA, and a fellow for energy policy at the University of Tennessee (UT)'s Baker School, in July 2024 identified the following parameters of electric energy system components and areas of innovation from the 2000's to the present:<sup>10</sup>

- Advanced Nuclear
- Connected Communication
- Decarbonization
- Electric Vehicles
- Energy Efficiency
- Future Grid Performance
- Gas Generation
- Regional Grid Transformation
- Renewables including wind and solar
- Storage integration

They are forecasting TVA growing two to three percent annually, especially with the growth of artificial intelligence (AI); they also have a goal to increase solar energy by 10,000 megawatts by 2030.

He identified the energy economy of the future as composed of the following components:

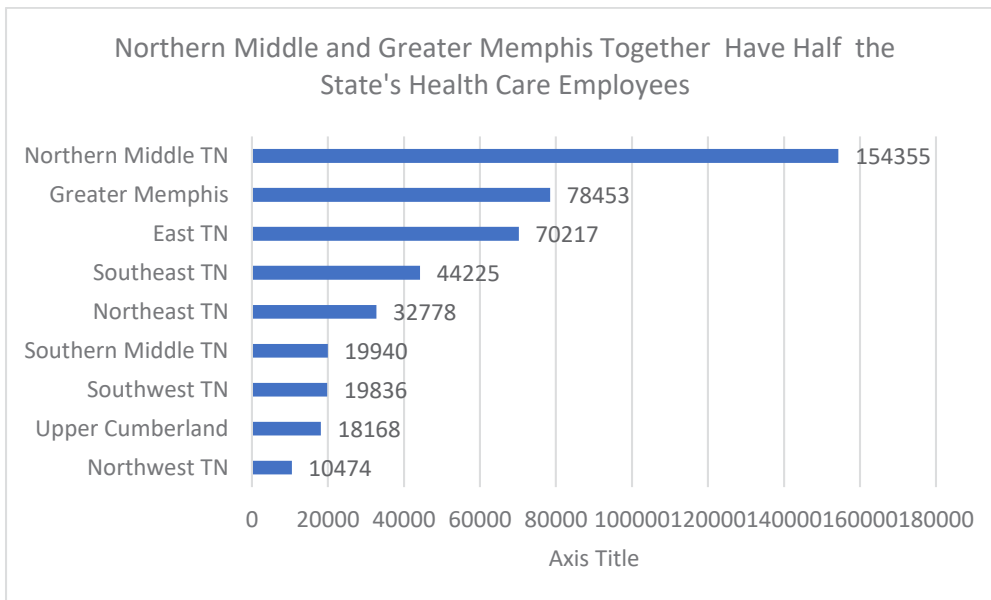
- Advanced Nuclear
- Virtual Power Plants
- Widespread Electrification
- Hydrogen Economy
- Low/no Carbon Generation
- Digitization
- Cybersecurity
- Augmented /Virtual Reality
- Artificial Intelligence
- Machine Learning (New Manufacturing Processes)

What are the workforce implications of these technologies or the introduction of any advanced technologies? Certainly constant, rapid change; how the change is led and implemented will define the workforce implications in the near term.

## The Health Care and Social Assistance Workforce

The fourth quarter of 2023 in Tennessee had an average of 449,826 health care and social assistance workers in Tennessee. The largest number of them, nearly 39 percent, worked in ambulatory care services; the next largest proportion, nearly 35 percent, worked in hospitals. The remainder worked in nursing and residential care facilities and social assistance agencies.

Currently the largest industry sector in the state, it is projected to increase to 488,370 by 2032, including private, state, local, and federal employees.



Source: TDLWD, WIRED Division, Quarterly Census of Employment and Wages (QCEW), Q4 2023, jobs4tn.gov

Figure 2

The LWDAs in the state with the lowest number of health care and social assistance employees per hundred population include the Northwest and Southern Middle LWDA<sup>11</sup>.

In the 2024 Academic Supply and Occupational Demand report, eight health sciences occupations were found to be in demand in seven or more LWDA:

- Occupational safety and health specialists ( bachelor's degree)
- Speech-language pathologist (master's degree)
- Pharmacy technicians (high school diploma or equivalent)

- Licensed practical nurses (postsecondary nondegree award)
- Physical therapy assistants (associate degree)
- Dental assistants (postsecondary nondegree award)
- Medical assistants (postsecondary nondegree award)
- Phlebotomists (postsecondary nondegree award)

Other occupations listed as unmet needs in the Health Sciences (programs with graduates' employment of 60 percent or more and median wage higher than the state median of \$39,979) included registered nurses, respiratory therapists, MRI technicians, medical laboratory personnel, physical therapists, and mental health nurses<sup>12</sup> (pp. 70-72). Data on these persistent shortages is displayed in real-time data in jobs4tn for the Tennessee for August 13, 2024, comparing the number of job openings listed and the candidates with resumes on the system.

**Table 2: Health Care Occupational Shortages**

Occupation Title	Number of Openings in Jobs4tn on 8/13/2024	Number of Candidates in Jobs4tn on 8/13/2024	Candidates as % of Available Jobs
Speech-language pathologists	262	0	0.0%
MRI technicians	90	0	0.0%
Physical therapists	1,048	1	0.1%
Advanced practice psychiatric nurses	77	1	1.3%
Registered nurses	6,335	96	1.5%
Physical therapist assistants	243	4	1.6%
Medical and clinical lab technologists	272	5	1.8%
Respiratory therapists	167	4	2.4%
Licensed practical nurses	1,491	54	3.6%
Phlebotomists	196	35	17.9%
Pharmacy technicians	328	60	18.3%
Medical and clinical lab technicians	134	28	20.9%
Dental assistants	121	33	27.3%
Medical assistants	394	164	41.6%
Occupational safety and health specialists	40	18	45.0%

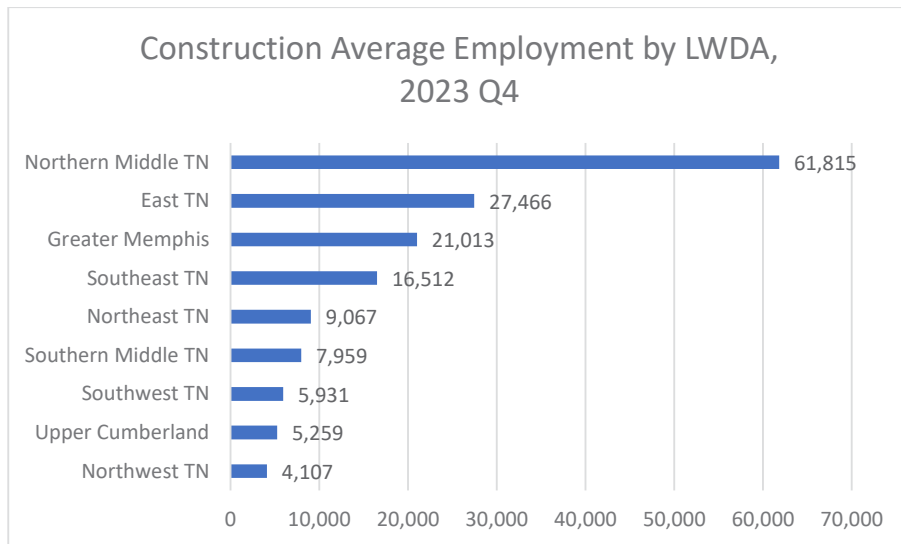
Source: Jobs4tn.gov, Occupational Profiles, job openings and candidates data.

**Partnerships to Reduce Shortages:** Novel programs to increase the number of health care personnel in Nashville include the partnership between Vanderbilt University and Metro Nashville Public Schools<sup>13</sup>. In 2023, the second year of the program, the university held an orientation at the Health Sciences Academy at Pearl-Cohn High School in North Nashville. In the program, Vanderbilt nurses mentor high school students who plan to become registered nurses by meeting with them weekly, discussing course work needed to pursue a registered nursing career, assisting them in understanding the process of applying to college, and providing encouragement.

After graduation, students may qualify for Vanderbilt's Care Partner Academy, a month long, full-time program which is tuition-free; after completion of the program, participants will be employed at VUMC as care partners. High school graduates can also be employed at VUMC as medical assistants. As full-time employees, they are then able to take advantage of Vanderbilt's nursing tuition benefit of \$8,000 for tuition annually for employees enrolled in accredited associate, bachelor's or master's degree nursing programs.

## The Construction Workforce in Tennessee

An average of 161,408 workers were employed in the construction industry in Tennessee during the final quarter of 2023. This was an increase of 5 percent over the year. Fueling this growth are projects like the building of the Titans Stadium and surrounding neighborhood in East Nashville, expected construction of more than 13,000 hotel rooms in Nashville<sup>14</sup>; the construction of Blue Oval City in Stanton, Tennessee; and other industrial, commercial, and residential projects around the state. According to Tennessee's long-term projections, the industry is projected to grow by 16.55 percent during the period 2022 to 2032.



Source: TDLWD, WIRED, QCEW 2023 Q4 Employment , Construction (NAICS code 23, all ownership codes)

Figure 3

The detailed industries within the construction sector include heavy and civil engineering construction (15.7 percent), construction of buildings (20.4 percent), and specialty trade contractors, which employed nearly 2 out of every three construction workers in the Q4 of 2023. The following table lists the construction occupations in demand in more than six LWDAs in the Academic Supply for Occupational Report 2024<sup>15</sup>. The number of recent job openings and number of active candidates in jobs4tn as of August 13, 2024 are shown. This recent supply and demand data shows continuing shortages of these key construction occupations in the state, with only construction laborers in a balanced supply and demand position.

**Table 3: Construction Workforce Occupational Shortages**

Occupation Title	Number of Openings in Jobs4tn on 8/13/2024	Number of Candidates in Jobs4tn on 8/13/2024	Candidates as % of Available Jobs
Painters, construction, and maintenance	49	1	2.0%
Heating, air conditioning, and refrigeration installers and mechanics	610	46	7.5%
Plumbers, pipefitters, etc	151	26	17.2%
Construction and building inspectors	42	12	28.6%
Electricians	137	50	36.5%
Operating engineer and other equipment operators	131	53	40.5%
Carpenters	102	43	42.2%
Construction Managers	173	75	43.4%
Construction Laborers	111	116	104.5%

Source: jobs4tn.gov, Occupational profiles, supply and demand.

Training programs to reduce shortages in these occupations produced more than 1,300 completers in 2022. These occupations have some of the highest rates of employment in Tennessee for aligned programs among all educational clusters; however, wages of many occupations remain below the average for entry-level wages for all occupations in the state. Completers for these shortage occupations included the following:

- Heating and air conditioning and refrigeration installers and mechanics: 404 certificate and 18 apprenticeship completers;
- Plumbers, pipefitters, and steamfitters: 38 certificate and 114 apprenticeship completers;
- Electricians: 262 certificate and 341 apprenticeship completers;
- Carpenters: 56 apprenticeship completers;

- Construction managers: 84 completers of bachelor's degree programs.

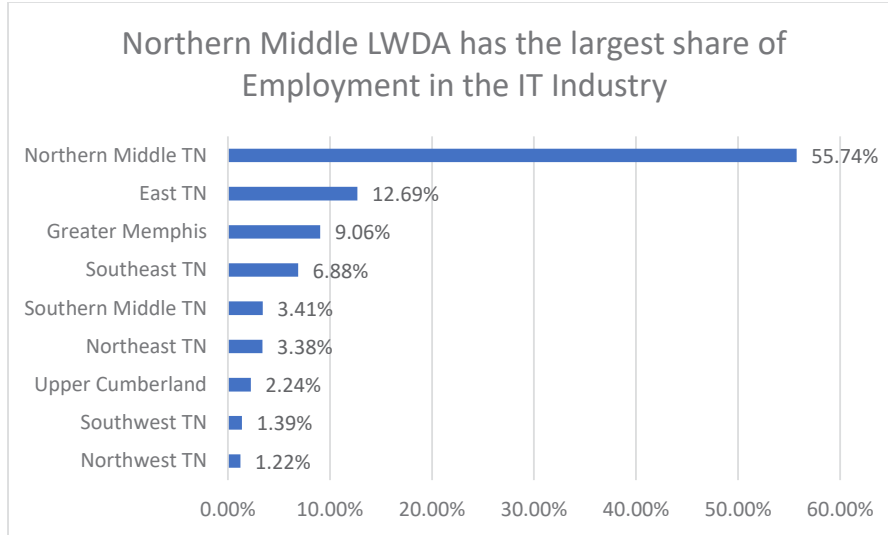
The other shortage occupations did not have programs addressing them. High school CTE programs were more generic, such as building construction technology/technician, with 891 completers; of these, 53 percent were employed in Tennessee, with average wages of \$38,497. Although the share of retirement age workers in construction is not as high as in some industries, skilled trades workers like carpenters and electricians are a higher proportion of workers near retirement age.<sup>16</sup>

**Integrated Workforce Partnerships:** The Department of Labor and the Tennessee Builders Alliance (TBA) are partnering to reduce justice-involved and other barriers to employment for 250 participants in the construction industry in the building of the new Nissan Stadium in Nashville. Through a grant to the TBA, the Titans Construction Training Camp was established, which features an onsite short course in basic training in construction skills with pay for participants, the ability to earn three credentials, supportive services such as math, childcare, and transportation assistance, a guaranteed interview for beginning construction jobs, and the formation of apprenticeships. Posting and application of construction jobs and interviewing are facilitated by TDLWD at the site; TDLWD also provides ongoing safety consultation.<sup>17</sup>

## The Digital Technology and Communications Workforce

In the fourth quarter of 2023, Tennessee had 51,056 employees in the information technology industry, working in nearly 9,600 establishments. These companies include publishing (including software publishing), broadcasting (including motion pictures), telecommunications, computing services providers, web search portals, libraries and archives, and other information services. In 2022, the largest of these included software publishers (11,460 employees), telecommunications (8,745), motion picture and video industries (8,010), and data processing and hosting (6,810), expected to add thousands of jobs through 2032.<sup>18</sup> The sound recording industry is expected to add more than 2,000 jobs during that time.

The information technology industry is concentrated primarily in four LWDA's, with more than half in the Northern Middle region; other concentrations are in the East (including Oak Ridge), Greater Memphis, and the Southeast.



Source: TDLWD, WIRED Division, Quarterly Census of Employment and Wages (QCEW), Q4 2023, jobs4tn.gov

Figure 4

Information technology occupations are more widely distributed, with some employees being found in nearly every industry in the state. The most in-demand IT occupations include computer user support specialists, computer network support specialists, computer systems analysts, information security analysts, and software developers.<sup>19</sup> Comparisons of online job listings to candidates in jobs4tn.gov for the state for August 7, 2024 showed shortages of candidates compared to job openings for computer systems analysts and software developers, and a balance of information security analysts and job openings.

The Academic Supply and Occupational Demand 2024 publication identified several academic programs as meeting the criteria of unmet needs, with graduates earning more than the state median wage in 2022 of \$39,929 and employment rates in Tennessee equal to or greater than 60 percent, including the postbaccalaureate certificate in medical informatics, the bachelor's degrees for computer systems analysts and computer and information sciences, the associate degree in information technology, and certificates for information security analysts and computer systems networking and telecommunications.<sup>20</sup>

The June 5, 2024 announcement by Elon Musk that he was bringing the world's largest supercomputer to Memphis has highlighted the need to increase training and support for potential workforce participants.<sup>21</sup> Although there is a diverse tech workforce, students in tech courses often face a variety of barriers or personal challenges to enrolling in and completing courses, including lack of tech training in the K-12 school system, those in poverty needing academic remediation, having experienced trauma, lack of childcare, lack of transportation and resources in general, and need for improved communication skills.<sup>22</sup> Overcoming these challenges and barriers can provide access to career educational opportunities leading to higher paid jobs.

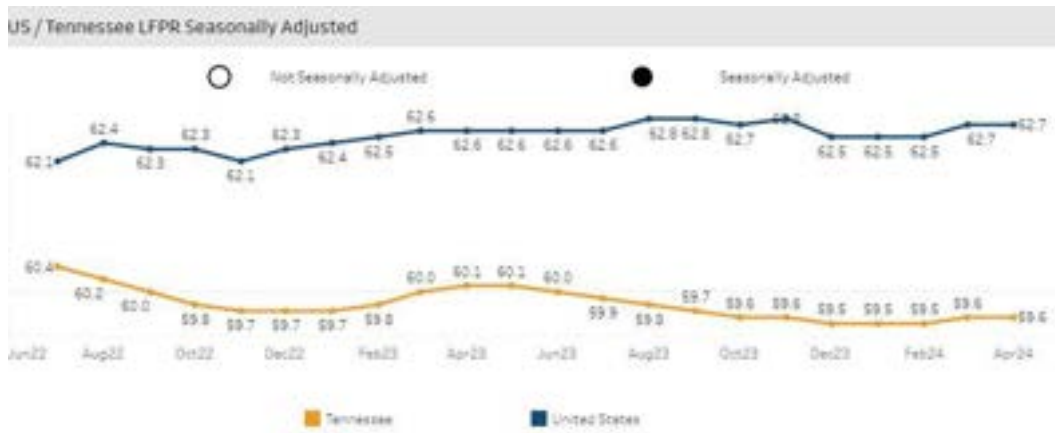
Similarly, the development of the STARS framework- a framework to promote the economic mobility of individuals Skilled Through Alternative Routes- identifies six contributors to greater mobility and workforce success- Family, Community Networks, Job Quality, Financial Resources, an Inclusive Workplace, and Employment Access,<sup>23</sup> which can be applied to increasing the tech workforce.

Another approach to reducing shortages of tech personnel and turnover in Nashville, one of the hottest IT recruiting markets in the U.S., is the Grow Your Own approach being applied by the Tennessee Department of Finance and Administration's STS for training and retaining personnel<sup>24</sup> called "Empowering the Future". This plan utilizes a variety of measures including mentoring, greater engagement, and encouraging certification attainment to achieve higher skill levels tied to higher compensation and to reduce turnover.

## Tennessee's Unemployment and Labor Force Participation

### United States and State of Tennessee Labor Force Participation Rate Comparison

US/Tennessee Labor Force Participation Rate (Seasonally Adjusted)



Data Source: Local Area Employment Statistics (LAUS) - TLDWD

Source: TN Department of Labor and Workforce Development and Bureau of Labor Statistics, April 2024.

<https://www.tn.gov/workforce/tennessee-economic-data-/labor-force-participation-analysis.html>

Figure 5

In 2024, Tennessee's unemployment rate has been trending downward. Tennessee's June 2024 seasonally adjusted unemployment rate was 3.0 percent, lower than the rate of 3.6 percent in June 2023. In contrast, the U.S rate of 4.1 percent in June 2024 increased from 3.6 percent in June 2023. Tennessee's monthly unemployment rate from September 2022 to June 2024 has only exceeded the U. S. rate in one month, January of 2023. Continuing the trend, Tennessee's annual average rate for 2023 was 3.3 percent, lower than the U.S. rate of 3.6 percent.

However, Tennessee's labor force participation rate also remained below that of the U.S. It declined in Tennessee from 61.7 percent in 2012 to 59.9 percent in June of 2024. The U.S. labor force participation rate also declined from 63.7 percent in 2012 to 63 percent in June of 2024 but it remained above the Tennessee rate of 59.9 percent.

## Factors Affecting the Labor Force Participation Rate

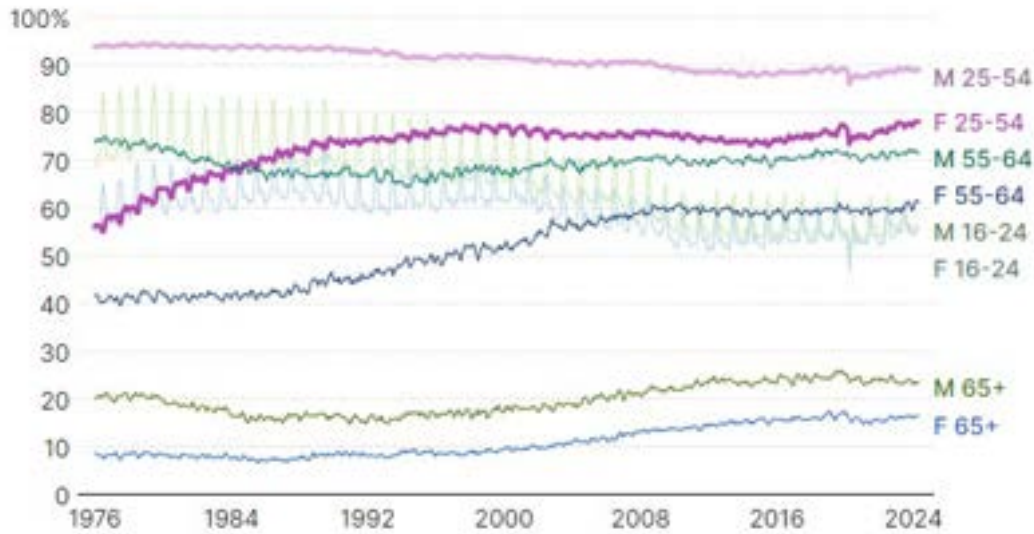
The Tennessee labor force participation rate (LFPR) has consistently been below that of the U.S. In May 2024 the U.S. rate was 62.5, holding steady over the month, while the Tennessee rate declined to 59.5 percent, a full three percentage points below the U.S. rate. The only LWDA in Tennessee which had a rate higher than the U.S. was Northern Middle at 67.2 percent; the lowest rate in the state was in the Northeast at 53 percent. National studies point to several factors which could affect the LFPR for the U.S. and which could be important in Tennessee as well, pointing to additional data which may need to be collected for the state and highlighting possibilities for improvement. These factors include:

1. **Demographic Fluctuation:** Long-running demographic patterns, such as the aging of the population, population fluctuation, and population displacement have been a large part of the explanation for the decline in the national LFPR. Changes in the shape of the "population age pyramid" over recent decades has also been a driver of LFPR. When most of the work force is of prime working age, LFPR will rise. As larger portions of the workforce age, this can negatively affect the LFPR (Abraham and Kearney, 2018).<sup>25</sup> However, measures can be taken to improve the situation.

A study by Krueger (2017) found that demographic fluctuation that is driven by long-running population patterns within demographic groups account for "between half and two thirds of the decline of the national LFPR".<sup>26</sup>

2. **Gender and Age Dynamics:** In the past, women's participation tended to negatively affect the labor supply curve; during the pandemic, parents and especially women had lower LFPRs. However, since the pandemic, nationally, prime-age women have been a powerful force in the labor force recovery. Their LFPR grew to their highest level ever in 2023. In January 2024, 78% of women between the ages of 25 and 54 were active in the labor force, a notable increase from the downturn in 2020.<sup>27</sup> However, the Brookings Institution study also noted there were differences by race and ethnicity in women's LFPRs during this time.

Availability of daycare resources and costs, as well as the gender pay gap can also affect women's participation, which started to slow among mothers with young children in mid-2024. The Women's Bureau of the U.S. Department of Labor is encouraging apprenticeship programs to provide childcare for participants to increase LFPRs of women.<sup>28</sup>



Source: Current Population Survey 1976–2024; authors' calculations.

Note: Data are not seasonally adjusted. The analysis in this figure uses "wtfinl" rather than "compwt" because "compwt" is only available starting in 1998.



Lauren Bauer and Noadia Steinmetz-Silber

Figure 6

- 3. Education and Demographic Groups:** Nationally, LFPR within different demographic groups have been identified as a main cause of decline as well. Other demographic factors such as the educational attainment of minorities can affect the labor supply curve. In the U.S., increased education is strongly related to higher LFPRs; those without a high school degree on average have LFPRs at about 60 percent; those with postsecondary education average 70 percent or higher. Increasing educational attainment of those with currently low education is a measure that has one of the largest impacts on LFPRs, especially among women.<sup>29</sup>
- 4. Social Security Disability Entitlements and Retirement:** Increases in the availability or payment levels of disability or Social Security benefits could reduce the number of people participating in the labor force. The benefit levels could affect the labor supply for specific demographic groups; for example, changes in Social Security retirement benefits could affect the labor supply of the elderly (Prados, 2019).<sup>30</sup> With an average time of 236 days for an initial disability decision, and 322 days for a hearing decision<sup>31</sup>, it is unlikely that changes in disability payment levels would affect month- to-month LFPRs.

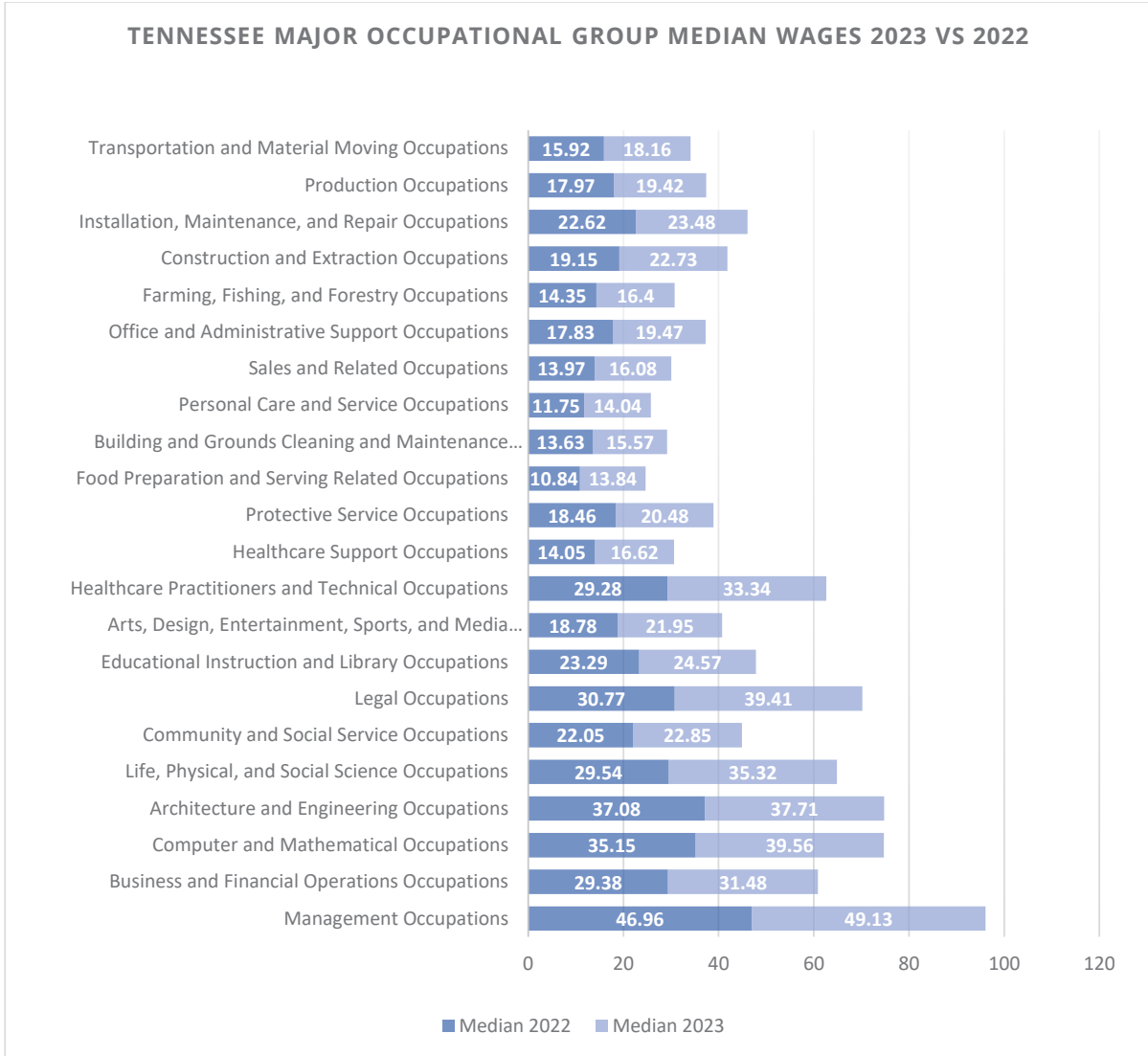
However, other industrialized countries have found that improvements in health and integrating those with health limitations into the labor market has had a greater effect on LFPRs than even increasing the education rates of those with currently lower education (Boheim et.al.).<sup>32</sup> Measures being used include early intervention programs, promoting vocational rehabilitation

policies, focusing more on what workers are able to do, and involving employers in preventing workers from permanently leaving the labor market due to illness. Even with an aging population, countries that have taken similar measures have seen LFPRs increase.

- 5. Veterans Affairs Retirements:** These benefits could theoretically affect the labor supply curve in a negative manner. This effect should be studied in Tennessee, considering that the state's middle region has a high volume of veterans that leave Fort Campbell daily. Whether veterans choose to work or not depending on the amount of their Veterans Affairs retirement could be a driver for the lower LFPR in Tennessee.
- 6. Immigration:** On a national level, immigration affects LFPR rates in direct and indirect ways. There is strong evidence of immigration having had a positive effect on overall LFPR by moderating the overall decline, whereas the sign and magnitude of the indirect effect remain uncertain.
- 7. Health and Opioid Crisis:** The increase in the health opioid crisis has resulted in increased mortality rates in males ages 45-54.<sup>33</sup> Regression analysis performed by Krueger (2017) leveraging county-level differences in opioid prescription rates show that opioid prescription rates and decreasing LFPR have become intertwined. However, studies have found that extending health insurance to low- income families can increase labor force participation.<sup>34</sup>

## Tennessee Wages 2022-2023

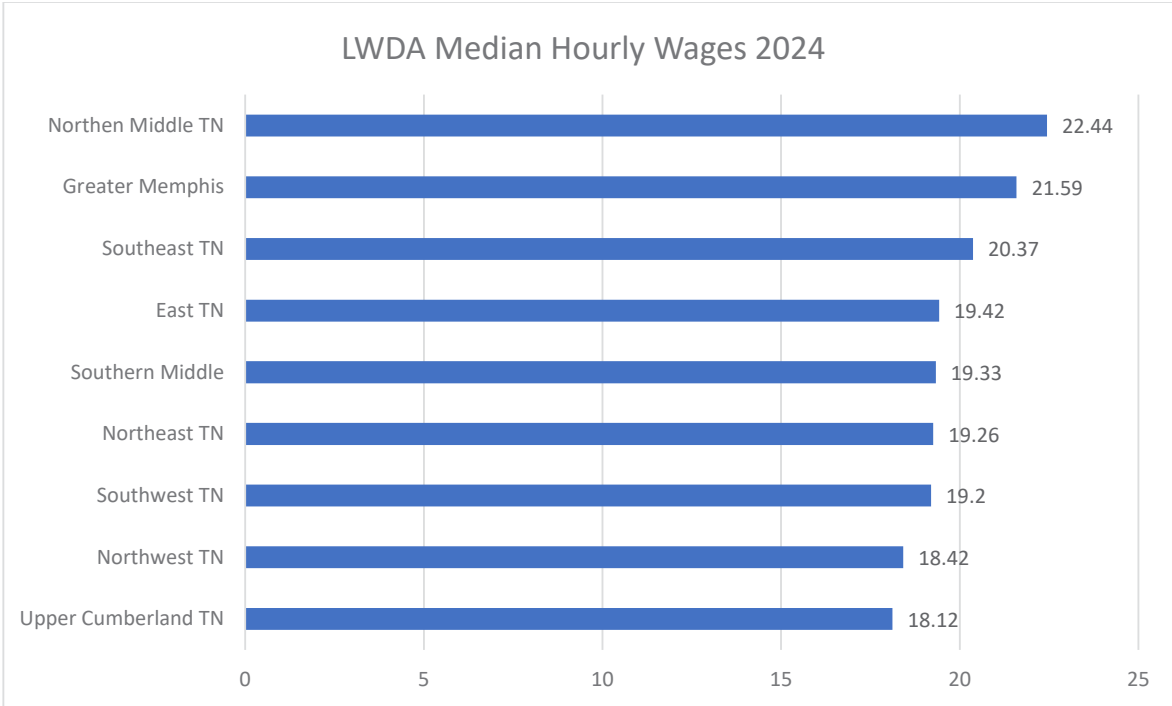
Median hourly wage growth for Tennessee from 2022 to 2023 averaged 9.7 percent, from \$19.20 in 2022 to \$21.07 in 2023. Among the 22 major occupational groups, median wages increased for all groups. The largest hourly increase was for legal occupations' pay (up \$8.64 per hour to \$39.41), followed by life, physical, and social sciences occupations (up \$5.78 per hour). Healthcare practitioners and technical occupations were up \$4.06. The post-pandemic demand for healthcare professionals could be a main driver of the wage increase.



Source: TDLWD, WIRED Division, Occupation Employment and Wages Survey

Figure 7

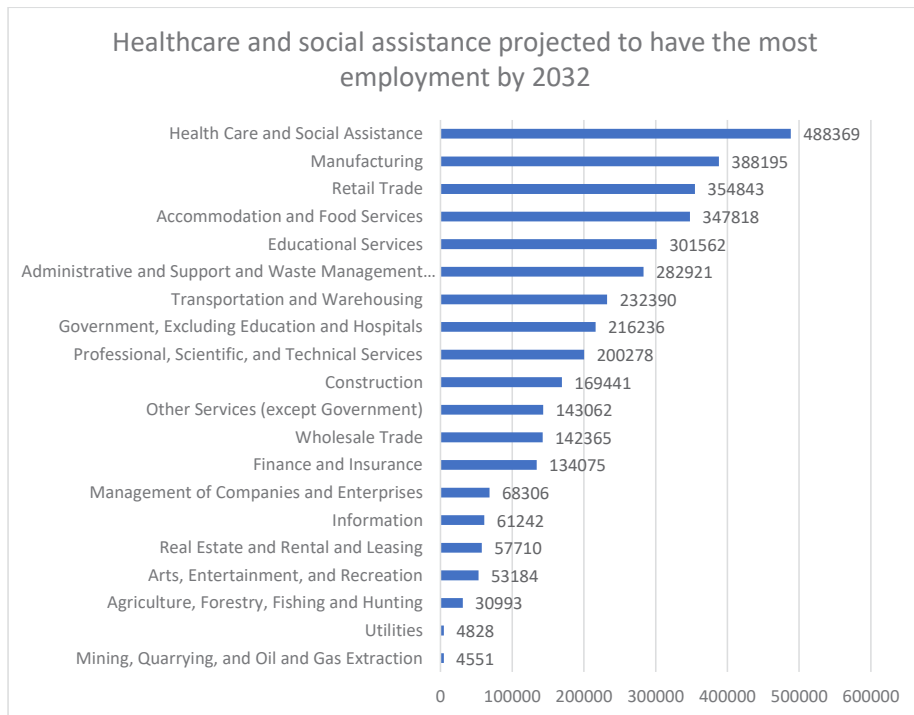
Average hourly wages differed by \$4.32 from a high of \$22.44 in the Northern Middle LWDA to \$18.12 in Upper Cumberland. As expected, average wages in the LWDA's including metropolitan areas had slightly higher wages than the more rural LWDA's. All LWDA's increased their average wages from 2022-2023.



Source: TDLWD, WIRED Division, Occupational Employment and Wages Survey, May 2023

Figure 8

## Tennessee Long Term Job Outlook to 2032



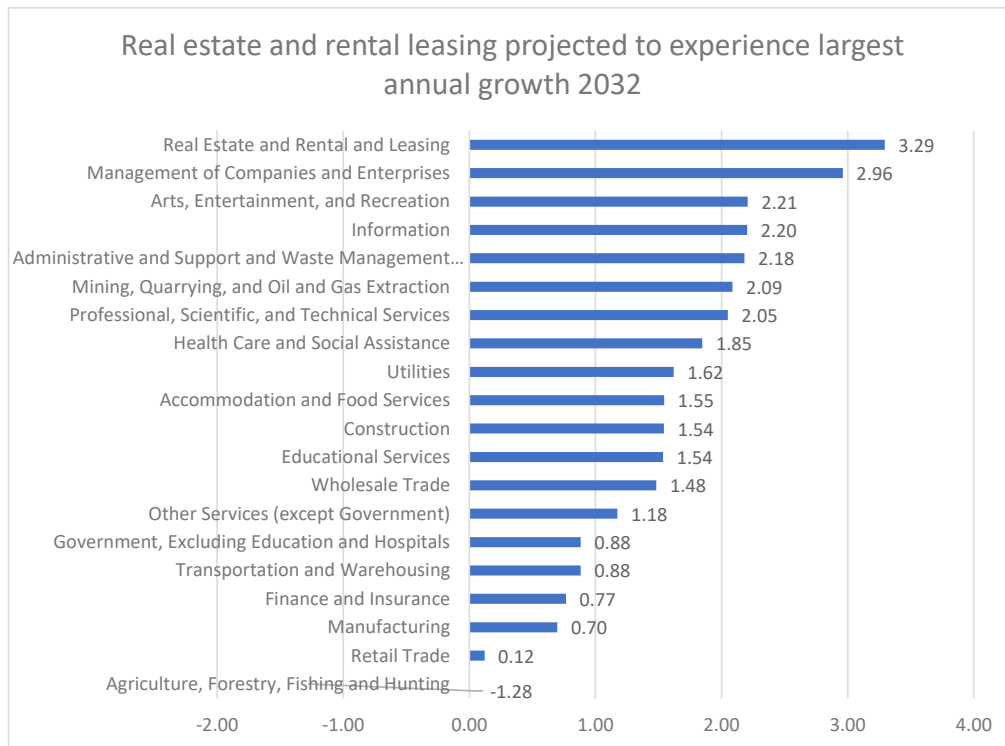
Source: TN Dept. of Labor and Workforce Development, WIRED Division, TN Long-Term Employment Projections 2022 2032, jobs4tn.gov.

Figure 9

From a base of 3.4 million jobs in 2022, total employment for Tennessee, including agricultural, self-employed, and private household workers, is expected to grow to 3.9 million by 2032. Expected to increase by 1.3 percent annually, as it recovers from lower employment in the base year of 2020 due to the pandemic, Tennessee's economy in the long run is expected to continue expansion in eleven of twelve major industry sectors, with only the agriculture, fishing and forestry sector experiencing a decline in employment. Projected employment by major industry group is shown in Figure 9.

Starting from the 2022 base, real estate and rental and leasing is expected to be the fastest-growing industry. Due to recovery from 2020, accommodation and food services as well as arts, entertainment and recreation are projected to continue steady growth as their employment continues to recover from pandemic losses. Other rapidly growing sectors include information, management of companies and enterprises, and administrative and support and waste management (Figure 10).

Tennessee's new efforts to manufacture electric vehicles and batteries, expand charging stations across the state, and other initiatives are expected to propel the manufacturing and construction industries to create over 25,000 jobs each. These sectors are expected to continue steady growth as efforts from the state of Tennessee to attract manufacturers to the state through incentives continue.



Source: TN Dept. of Labor and Workforce Development, WIRED Division, TN Long-Term Employment Projections 2022-2032, jobs4tn.gov.

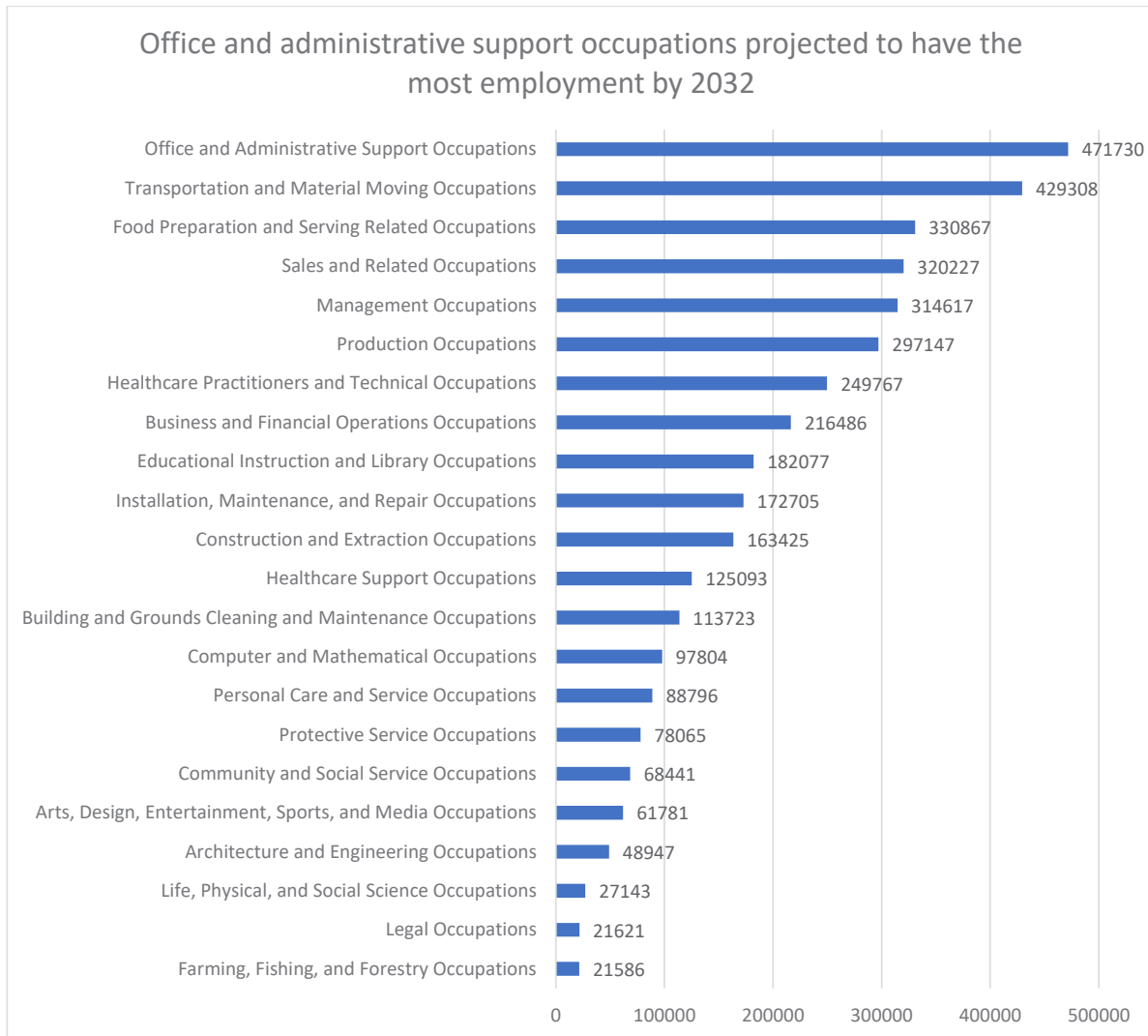
Figure 10

**Table 4: Occupational Projections by Major Occupational Group in Tennessee 2022-2032**

Major Occupation Group Title	2022 Estimated Employment	2032 Projected Employment	2022-2032 Employment Change	2023 Median Annual Wage
Total, All Occupations	3,423,768	3,901,356	477,588	43,816
Management Occupations	266,461	314,617	48,156	102,181
Business and Financial Operations Occupations	181,887	216,486	34,599	65,480
Computer and Mathematical Occupations	76,069	97,804	21,735	82,292
Architecture and Engineering Occupations	42,539	48,947	6,408	78,439
Life, Physical, and Social Science Occupations	23,459	27,143	3,684	73,469
Community and Social Service Occupations	59,872	68,441	8,569	47,527
Legal Occupations	18,734	21,621	2,887	81,972
Educational Instruction and Library Occupations	155,989	182,077	26,088	51,111
Arts, Design, Entertainment, Sports, and Media Occupations	52,977	61,781	8,804	45,650
Healthcare Practitioners and Technical Occupations	212,411	249,767	37,356	69,338
Healthcare Support Occupations	97,094	125,093	27,999	34,575
Protective Service Occupations	70,545	78,065	7,520	42,588
Food Preparation and Serving Related Occupations	284,799	330,867	46,068	28,787
Building and Grounds Cleaning and Maintenance Occupations	99,931	113,723	13,792	32,388
Personal Care and Service Occupations	74,907	88,796	13,889	29,202
Sales and Related Occupations	302,626	320,227	17,601	33,436
Office and Administrative Support Occupations	446,267	471,730	25,463	40,493
Farming, Fishing, and Forestry Occupations	24,556	21,586	-2,970	34,106
Construction and Extraction Occupations	138,939	163,425	24,486	47,269
Installation, Maintenance, and Repair Occupations	145,107	172,705	27,598	48,830
Production Occupations	272,558	297,147	24,589	40,401
Transportation and Material Moving Occupations	376,041	429,308	53,267	37,781

Source: TN Dept of Labor and Workforce, WIRED Division, OEWS 2024 and 2022-2032 Long-Term Projections

Professional, scientific, and technical services is expected to grow steadily over the next decade at a yearly rate of 2.1 percent. The state of Tennessee's diligence in encouraging education in technical and scientific fields through legislation that allows all Tennesseans access to affordable technical education could be a reason for this steady growth. Healthcare and social assistance is not only the largest industry by employment (Figure 5), but it also is expected to create the most new jobs over the decade (more than 80,000), continuing the growth trend from previous years as the population in the state increases in the percent over 65 years of age. The retail industry is expected to continue its slow growth but still is expected to be the third largest industry in the state in 2032.



Source: TN Dept. of Labor and Workforce Development, WIRED Division, TN Long-Term Employment Projections 2022-2032, jobs4tn.gov.

Figure 11

Healthcare support as well as computer and mathematical occupations are the two main occupational groups which are projected to show the largest yearly growth through 2032. These major groups are both expected to grow by more than 2 percent annually. Computer and mathematical occupations are expected to increase employment by more than 20,000. Jobs in transportation and material moving occupations are projected to increase by 50,000 by 2032, and it is also forecast to be the group with the second most job openings through 2032. Other occupational groups expected to have the most new jobs are management, food preparation and serving, and health care practitioners and technical workers. Occupational groups with median wages above the state average usually require a college education, except for construction and extraction and installation, maintenance, and repair.

Office and administrative support occupations are expected to have the most employment by 2032. Despite this, these occupations are projected to have the slowest rate of annual growth. This could be due in part to many employers planning for hybrid work, rather than completely remote work, and to the increasing use of technology. Transportation occupations are also projected to significantly increase in employment by 2032. Those occupations are projected to have a steady annual increase (over 1.3 percent annually) through 2032.

## Occupational Tools, Technology, and Certifications

A glimpse into the top tools and technologies found most frequently in advertised jobs on the jobs4tn.gov website is displayed in the following table. The top tools and technologies include computer business programs and equipment and warehouse equipment. Top certifications in advertised job listings include a variety of medical and pharmacy certifications and those for truck driving, social work, and accounting.

**Table 5: Top Advertised Tools and Technology for Tennessee**

Rank	Advertised Detailed Tool or Technology	Job Opening Match Count
1	Microsoft (MS) Office	13,506
2	Microsoft PowerPoint	4,308
3	Forklift	4,162
4	Cash Register	3,798
5	Motor vehicles	3,430
6	Personal protective equipment	3,200
7	Microsoft Word	2,617
8	Hypertext markup language (HTML)	2,367
9	Cell Phone	2,282
10	Microsoft Excel	2,153

Source: Online advertised jobs data  
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**Table 6: Top Advertised Job Certifications for Tennessee**

Rank	Advertised Certification Group	Job Opening Match Count
1	Registered Nurse (RN)	14,064
2	American Red Cross Certifications	11,728
3	American Heart Association (AHA) Certifications	8,351
4	Commercial Drivers License (CDL)	6,664
5	Licensed Practical & Licensed Vocational Nurses (LPN & LVN)	4,685
6	Certified Nursing Assistants (CNA)	2,729
7	American Institute of CPAs (AICPA) Certifications	1,248
8	National Registry of Emergency Medical Technicians (NREMT)	895
9	Social Worker Credentials & Certifications	555
10	Certified Registered Nurse Anesthetist (CRNA)	491

Source: Online advertised jobs data

**Table 7: Employers by Number of Job Openings**

Rank	Employer Name	Job Openings
1	Food City	1,533
2	Covenant Health	1,315
3	Vanderbilt University Medical Center	1,218
4	Sonic Corp.	872
5	McDonald's Corporation	869
6	The Kroger Co.	748
7	Metropolitan Nashville Public Schools	738
8	Ascension	689
9	HCA Healthcare, Inc.	654
10	National HealthCare Corporation	597

Source: Online advertised jobs data

**Table 8: Occupations by Advertised Jobs**

Rank	Occupation	Job Openings
1	Registered Nurses	6,447
2	Retail Salespersons	2,059
3	Fast Food and Counter Workers	1,453
4	Licensed Practical and Licensed Vocational Nurses	1,296
5	General and Operations Managers	1,275
6	First-Line Supervisors of Food Preparation and Serving Workers	1,256
7	First-Line Supervisors of Retail Sales Workers	1,162
8	Customer Service Representatives	1,090
9	Physicians, All Other	942
10	Physical Therapists	909

Source: Online advertised jobs data

## Endnotes

<sup>1</sup>Environmental Defense Fund, March 2023. US Electric Vehicle Manufacturing Investments and Jobs, p. 3. State-Electric-Vehicle-Policy-Landscape.pdf

<sup>2</sup>Carolyn Eggers, Tennessee secured \$7 B in clean energy business this past year- representing nearly 80% of new investments. WPLN Radio, August 29, 2023. [wpln.org/post/Tennessee-secured-7b-in-clean-energy-business-this-past-year-representing-nearly-80-of-new-investments/](https://wpln.org/post/Tennessee-secured-7b-in-clean-energy-business-this-past-year-representing-nearly-80-of-new-investments/)

<sup>3</sup>Loren McDonald, CEO, EVAdoption, Tennessee Momentum Drive Electric Summit, May 9, 2024.

<sup>4</sup>Sam Wills, Tennessee Regional Director, Tennessee Department of Economic and Community Development, Tennessee Momentum Electric Drive Summit, May 9, 2024.

<sup>5</sup>Victoria Hirschberg, Assistant Vice President of Research, Outreach and Economic Development, University of Tennessee, Tennessee Momentum Drive Electric Summit.

<sup>6</sup>Tony Millican, Executive Vice President for Workforce Development, Motlow State Community College, Tennessee Momentum Drive Electric Summit.

<sup>7</sup>Rebecca Ashford, President, Chattanooga State Community College, Tennessee Momentum Drive Electric Summit.

<sup>8</sup>Joy Rich, Manager of Workforce Development, Nissan North America, Murfreesboro, Tennessee Momentum Drive Electric Summit.

<sup>9</sup>Clean Jobs America 2023 [www.cleanjobsamerica.e2.org](http://www.cleanjobsamerica.e2.org), based on data collected for the U.S. Energy and Employment Report (USEER).

<sup>10</sup>TAEBC, "TVA's Power Systems of the Future" (video), July 24, 2024.

<sup>11</sup>WIRED calculation, 2022 population and QCEW Q4 2023 health care and social assistance employment.

<sup>12</sup>Academic Supply for Occupational Demand 2024: Tennessee Higher Education Commission, TDLWD, Tennessee Department of Education, and Tennessee Department of Economic and Community Development. <https://www.tn.gov/content/tn/thec/research/supply-and-demand.html>

<sup>13</sup><https://news.vumc.org/2023/11/09/vumc-again-collaborating-to-bring-nursing-education-to-metro-schools/>

<sup>14</sup>Davis, Molly. June 16, 2024. Nashville poised to gain 13,225 new hotel rooms. *Tennessean*, pp. 1D-2D

<sup>15</sup>Academic Supply for Occupational Demand 2024, pp. 29-30.

<sup>16</sup>Davidson, Paul. August 11, 2024. Help wanted. *Tennessean*, pp. 1W-2W.

<sup>17</sup><https://www.tn.gov/workforce/newsletter/2024/august-stadium-construction.html>

<sup>18</sup>TDLWD, WIRED Division, Tennessee Long Term Industry Employment Projections 2022-2032, jobs4tn.gov.

<sup>19</sup>Academic Supply for Occupational Demand 2024

<sup>20</sup>Ibid., p. 13.

<sup>21</sup>Rainer, Nell. (July 25, 2024). xAI project puts spotlight on Memphis' tech workforce. Tennessean, pp.9A and 11A

<sup>22</sup>Ibid., p. 11A.

<sup>23</sup>STARS Barriers and Breakthrough Report Download.pdf

<sup>24</sup>TN\_State-CIO-Office-Special-Recognition.pdf

<sup>25</sup>Abraham, K. & Kearney, M. (2018). "Explaining the Decline in the U.S. Employment – to- Population Ratio: A review of the evidence" (NBER Working Paper No 24333). Cambridge, Mass: National Bureau of Economic Research.

<sup>26</sup>Krueger, A.B., (2017). "Where Have All the Workers Gone? An Inquiry into the Decline of the U.S. Labor Force Participation Rate." Brookings Papers on Economic Activity, (Fall 2017), 1-59.

<sup>27</sup>Bauer, L. and Steinmetz-Silber, N. (July 26, 2024).Prime-age women are still driving the labor market recovery. <https://www.brookings.edu>articles>

<sup>28</sup>Remarks by Acting Secretary of Labor Julie Su on the Philadelphia Workforce Hub Commitments (As Delivered) | U.S. Department of Labor (dol.gov) <https://www.dol.gov/newsroom/speech/20240711>

<sup>29</sup>Boheim, R.,Horvath, T.,Leoni, T. and Spielauer, M. (2023). "The Impact of Health and Education on Labor Force Participation in Aging Societies: Projections for the United States and Germany from Dynamic Microsimulations." *Popul.Res.Policy. Rev* (42)3: 39. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10132801/>

<sup>30</sup>Perez-Arce, F., and Prados M. (2020). "The Decline in the U.S. Labor Force Participation Rate: A Literature in Review. USC Center for Economic and Social Research.

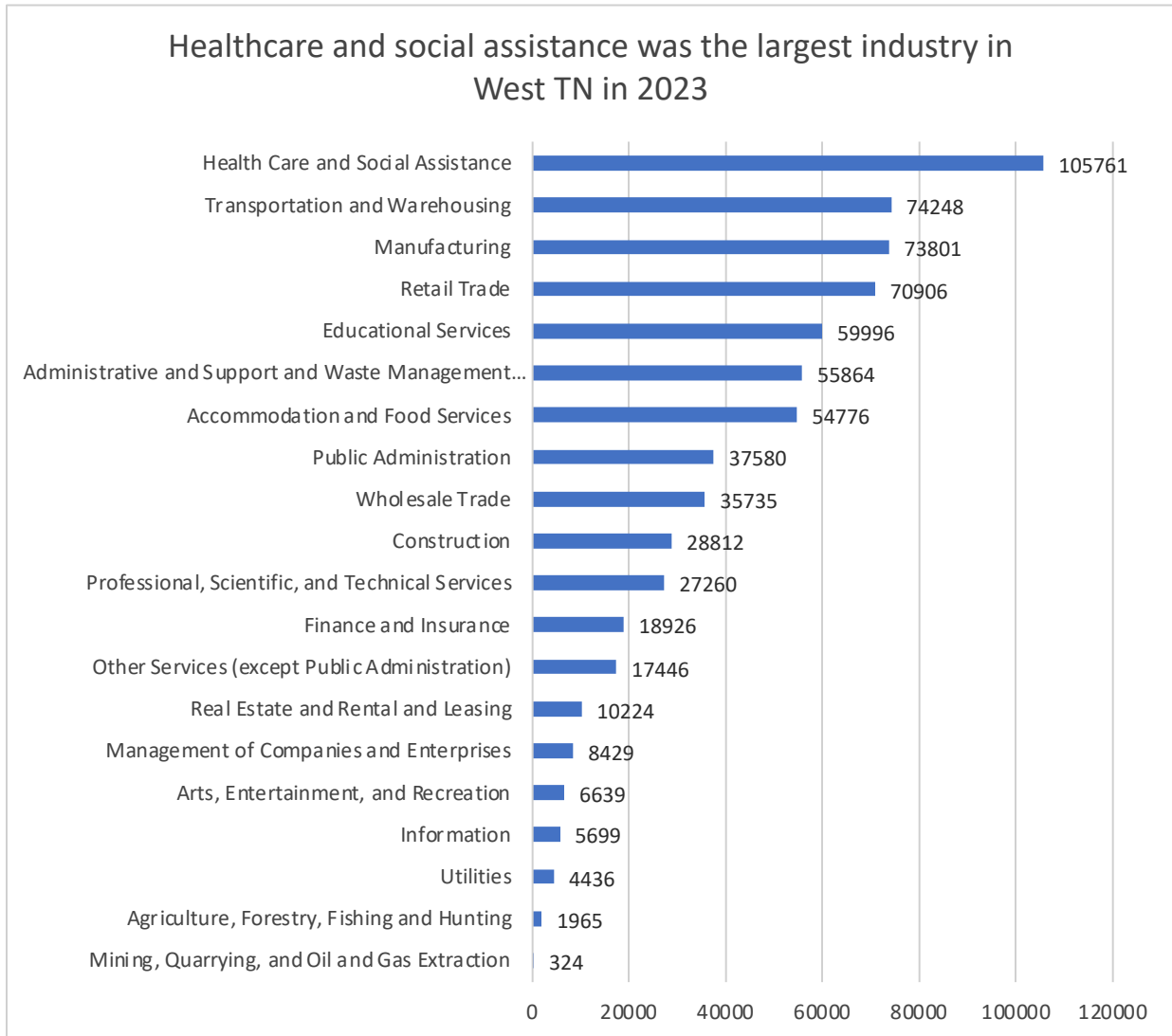
<sup>31</sup>Ssa.gov/security stat. August 6, 2024

<sup>32</sup>Boheim, R., et al. *Rev* (42) 3: 39.

<sup>33</sup>Case, A. and Deaton, A. (2017). "Mortality and Morbidity in the 21st Century." *Brookings Papers on Economic Activity*, 2017, 397

<sup>34</sup>Livermore, G; Nowak, M. and Stapleton, D. (2001). The Role of Health Insurance in Successful Labor Force Entry and Employment Retention. U.S. Department of Health and Human Services. <https://aspe.hhs.gov/reports/role-health-insurance-successful-labor-force-entry-employment-retention#chapII.B>

## West Region Overview



Source: TN Department of Labor and Workforce Development, WIRED Division, QCEW, July 2024

Figure 12

## West Region's Economy, 2022-2023

Total employment in the West Region decreased from 702,007 to 701,393, a decrease of 0.09 percent or 614 jobs (QCEW, annual average employment, 2022 and 2023). This decrease in employment is contrary to the overall trend of the state and the other two regions. Last year the area showed an increase in employment. Two MSAs that were showing an increase rapidly last year within the West region were Jackson and Memphis. Although employment in Jackson increased slightly over the year, the Memphis MSA declined in employment by 2,500 jobs to 659,100, slowing regional employment.

The West Region consists of three Local Workforce Development Areas: Greater Memphis, Southwest, and Northwest, encompassing a total of 21 counties (see Appendix). The number of

establishments showed an increase in 2023 to 40,875 from nearly 40,000 in 2022. Total payroll in the West region increased to \$44.6B up from 43.1B from the previous year. This increase was at about the same pace as the increase experienced in the region last year.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, was \$63,580, which represented a 22.9% increase from 2022. In 2023, the median occupational wage for the West region was \$43,080. This represented an increase of 9.2 percent from last year's \$39,430. Despite the slowdown in employment, the region has seen an increase in wages, continuing the trend set last year, when the median occupational wage increased by 6.7% in 2022 from 2021.

Unemployment in the region was 4.1 in 2023, a decrease from 4.2 in 2022. Youth unemployment in 2022 (the latest available) remained above the state average at 16.18%. This also represents a decrease in youth unemployment from 17.1% in 2021 in the region. The percent of those individuals who are unemployed with a disability also rose in the West region to 16.6%. This is slightly above the state of Tennessee's average. The percent of individuals not in the labor force with a disability also rose to 36% from 35.4% in the region last year. This percent is also higher than the state's.

**To summarize:** In 2023 compared to 2022, the West Region saw a decrease in employment. Payroll increased as it did in the region in the previous year. This was also the case for the median wage in the region, which saw a more significant increase than in the previous year. In 2023, unemployment rates overall and for youth and those in poverty remained higher than state rates.

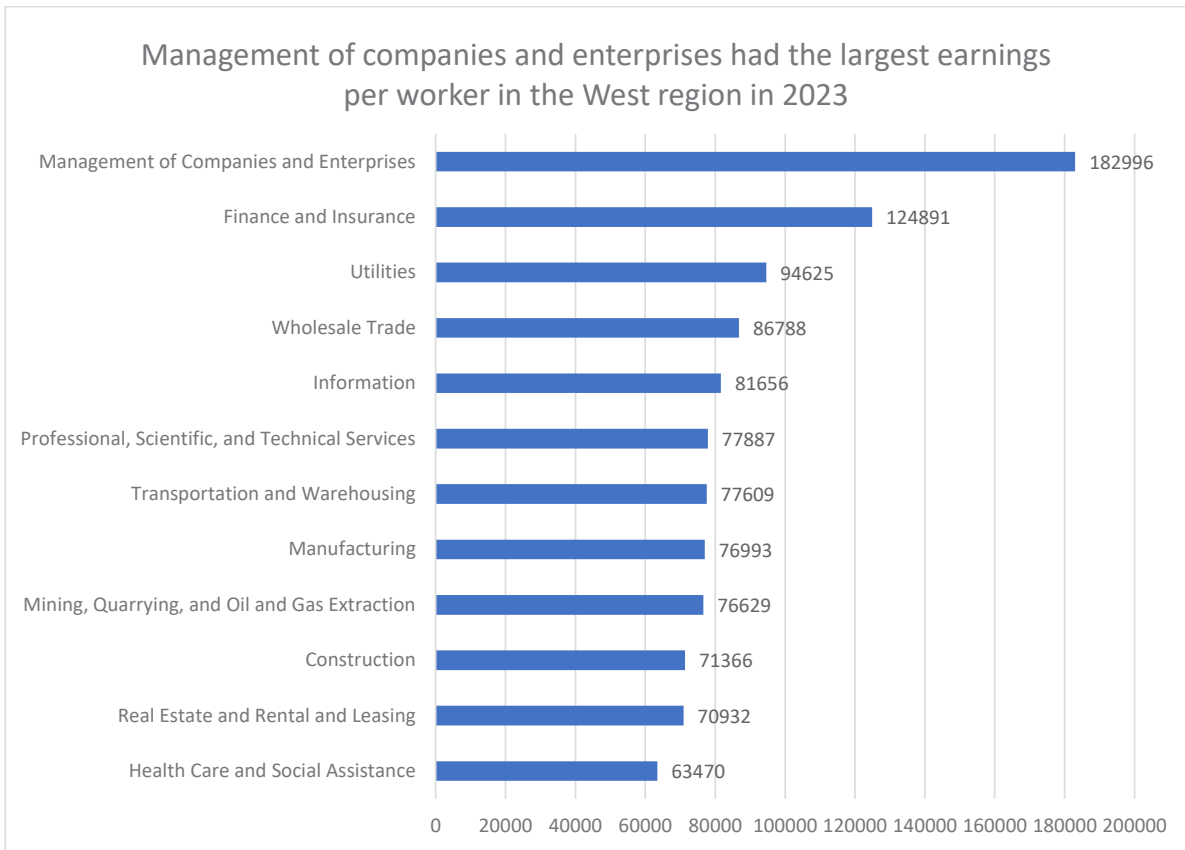
## West TN Industry Employment and Earnings (2018-2023)

Total annual average employment in the West Region in 2023 was 701,393. The five largest industry sectors in 2023 were:

- Health care and social assistance (108,763 jobs)
- Transportation and warehousing (76,646)
- Retail (72,832)
- Manufacturing (72,117)
- Educational Services (57,003)

Compared to 2018, the industries adding the most workers included healthcare and social assistance (over 11,000 new jobs), transportation and warehousing (9,100 new jobs), and construction (over 3,700 new jobs). Some of the region's largest industries lost jobs from 2018 to 2023, including retail trade (nearly 4,000), administrative and support (7,000), and finance and insurance (2,000). This continues a trend set in the region in past years. All industry sectors

saw an increase from their pre-pandemic earnings per worker, except for arts, entertainment, and recreation. The largest increases in earnings per worker were in the real estate rental and leasing, information, and administrative and support and waste management industries. These three industries have seen their earnings per worker increase 35 percent from the pre-pandemic earnings. The industries with the highest earnings per worker were management of companies and enterprises, finance and insurance, and utilities.



Source: TN Department of Labor and Workforce Development, WIRED Division, QCEW, July 2024 (top industry groups).

Figure 13

**Table 9: Transportation and Healthcare and Social Assistance Services Added the Most Jobs 2018-2023**

West Region Industries	2018 Jobs	2023 Jobs	Change in Jobs	% Change in Jobs	2018 Earnings Per Worker	2023 Earnings Per Worker	% Change in earnings per worker
Accommodation and Food Services	60,291	56,699	-3,592	-6%	18,648.32	23,484.59	26%
Administrative and Support and Waste Management and Remediation Services	61,776	54,665	-7,111	-12%	35,811.29	48,227.78	35%
Agriculture, Forestry, Fishing and Hunting	2,311	2,347	36	2%	35,664.97	43,894.42	23%
Arts, Entertainment, and Recreation	6,554	6,938	384	6%	52,348.68	48,946.13	-6%
Construction	27,277	31,051	3,774	14%	57,548.23	71,365.51	24%
Educational Services	56,798	57,003	205	0%	43,298.95	48,322.86	12%
Finance and Insurance	20,828	18,697	-2,131	-10%	105,896.78	124,890.62	18%
Health Care and Social Assistance	97,558	108,763	11,205	11%	53,583.39	63,470.26	18%
Information	5,983	5,958	-25	0%	60,551.80	81,656.48	35%
Management of Companies and Enterprises	9,430	8,450	-980	-10%	139,606.44	182,995.89	31%
Manufacturing	71,511	72,117	606	1%	62,249.46	76,993.12	24%
Mining, Quarrying, and Oil and Gas Extraction	321	332	11	3%	61,102.81	76,629.01	25%
Other Services (except Public Administration)	18,203	18,380	177	1%	37,201.99	49,466.88	33%
Professional, Scientific, and Technical Services	24,774	27,253	2,479	10%	60,871.18	77,886.53	28%
Public Administration	37,224	39,056	1,832	5%	52,340.39	61,277.07	17%
Real Estate and Rental and Leasing	10,291	10,503	212	2%	52,444.70	70,931.63	35%
Retail Trade	76,654	72,832	-3,822	-5%	33,282.05	42,241.52	27%
Transportation and Warehousing	67,509	76,646	9,137	14%	67,286.96	77,609.42	15%
Utilities	4,420	4,553	133	3%	71,422.22	94,624.52	32%
Wholesale Trade	34,949	35,675	726	2%	68,665.25	86,787.96	26%

Source: TN Dept of Labor and Workforce, QCEW Annual Averages, 2018 and 2023

## West Region Occupational Employment

The transportation and material moving occupational group remains the largest in the West Region, according to the Occupational Employment and Wages Survey for 2023, which provides data on all industries except agriculture and the self-employed. Although this major group was the largest in employment, it lost more than 2,000 jobs since May 2015. Employment in this group in May 2024 was 102,910. Among the major groups employing the most workers, office and administrative support and production also lost some employment, with food preparation and serving gaining nearly 3,500 jobs.

Among the groups gaining the most jobs were business and financial operations, construction and extractive, management, and protective services occupations, with health care support and information technology gaining more than 500 jobs each.

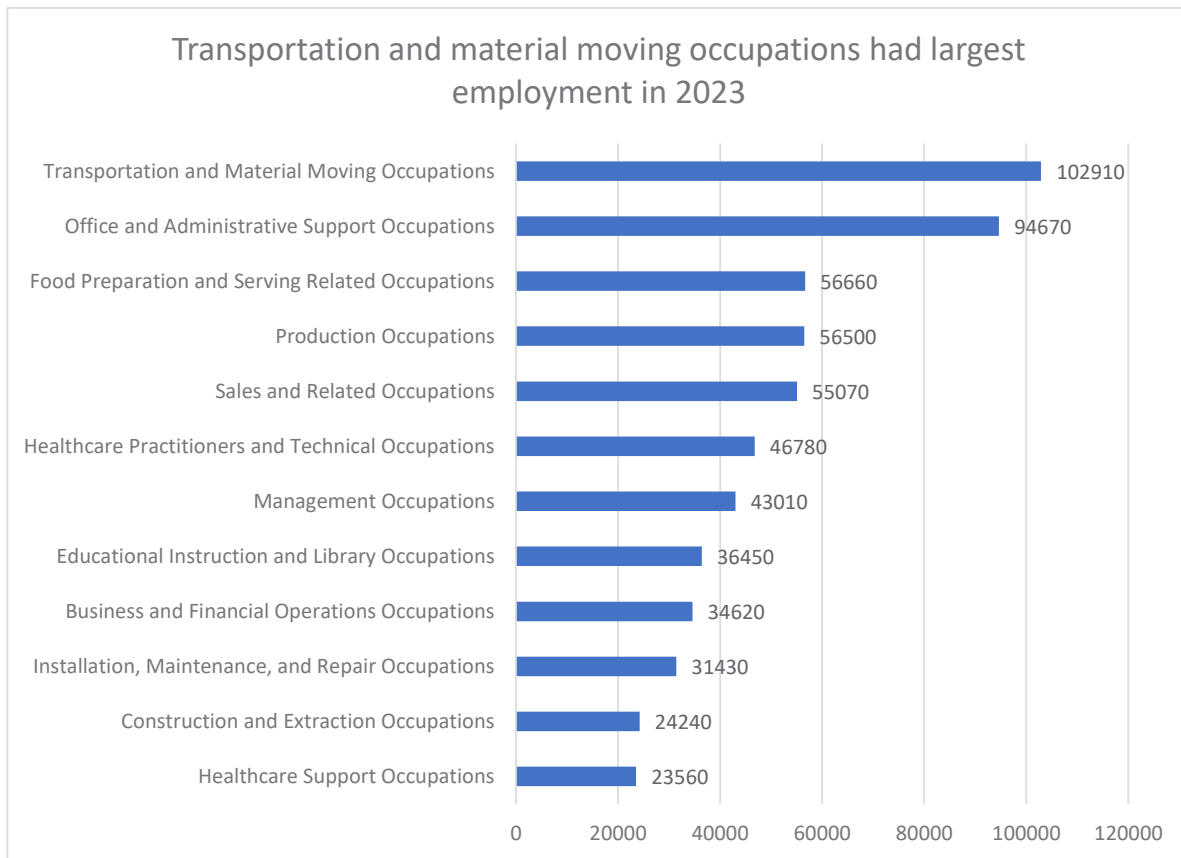
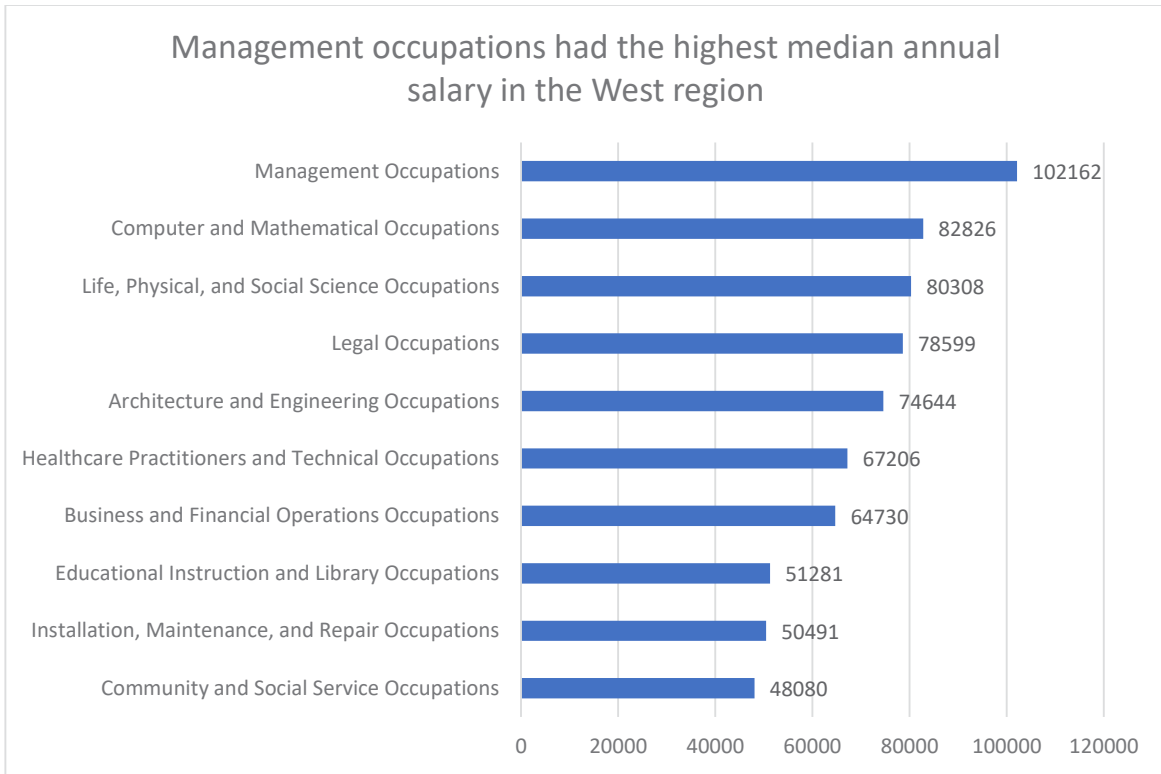


Figure 14

Source: TN Department of Labor and Workforce Development, WIRED Division, OEWS, May 2023, top occupational groups by employment.



Source: TN Department of Labor and Workforce Development, WIRED Division, OEWS, September 2024

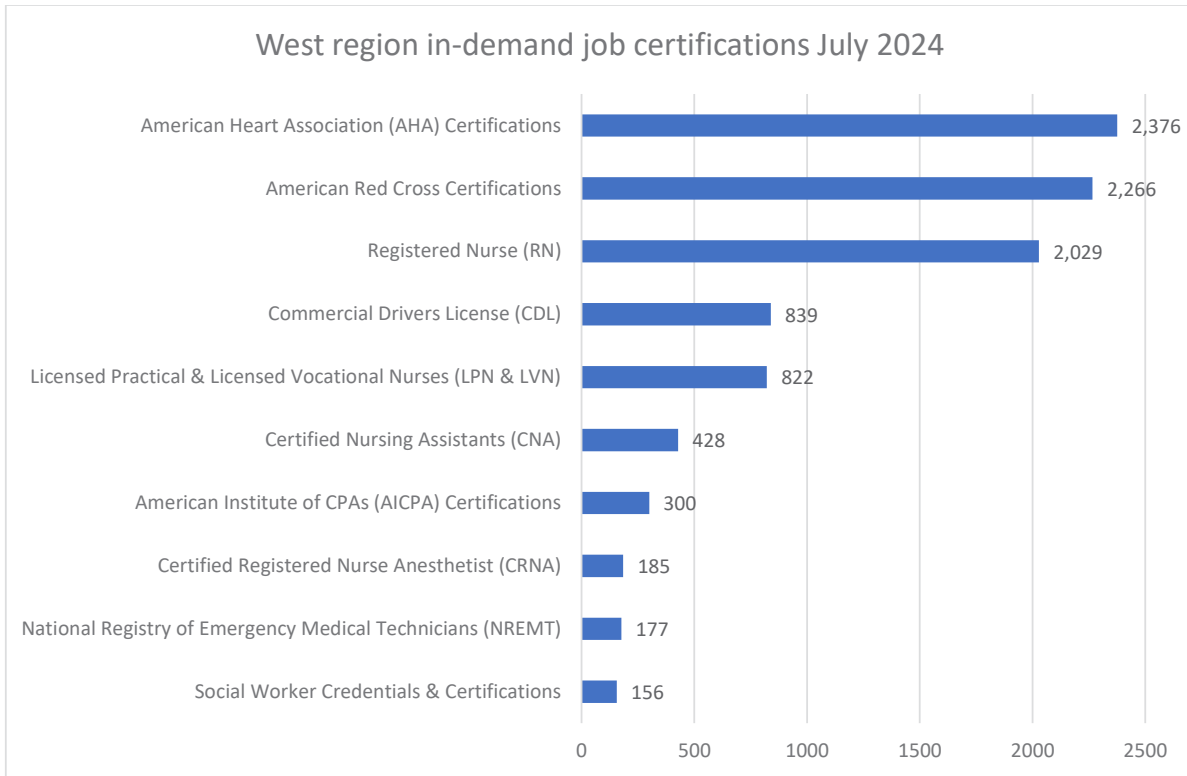
Figure 15

The TDLWD jobs4tn.gov web site tracks the top in-demand job certifications and tools and technologies from its advertised jobs database, updated daily. The table below shows the most requested certifications, including CPR, nursing credentials, and commercial driver license certifications. For June 2024, the most requested technologies in the West Region included facility with Microsoft Office and Power Point, Word, and the SQL query language, operation of cash registers and forklifts, and use of personal protective equipment. Of the top 10 employers posting jobs in the West Region in July 2024, eight included hospitals and other healthcare institutions. Reflecting the top occupational groups and those adding the newest jobs, top job postings in the region included healthcare practitioners and technical occupations, management, transportation, and material moving, sales, office, and food preparation.

**Table 10: Life, Physical and Social Science, Business and Finance, Construction Add the Largest Percent of New Jobs 2015-2023**

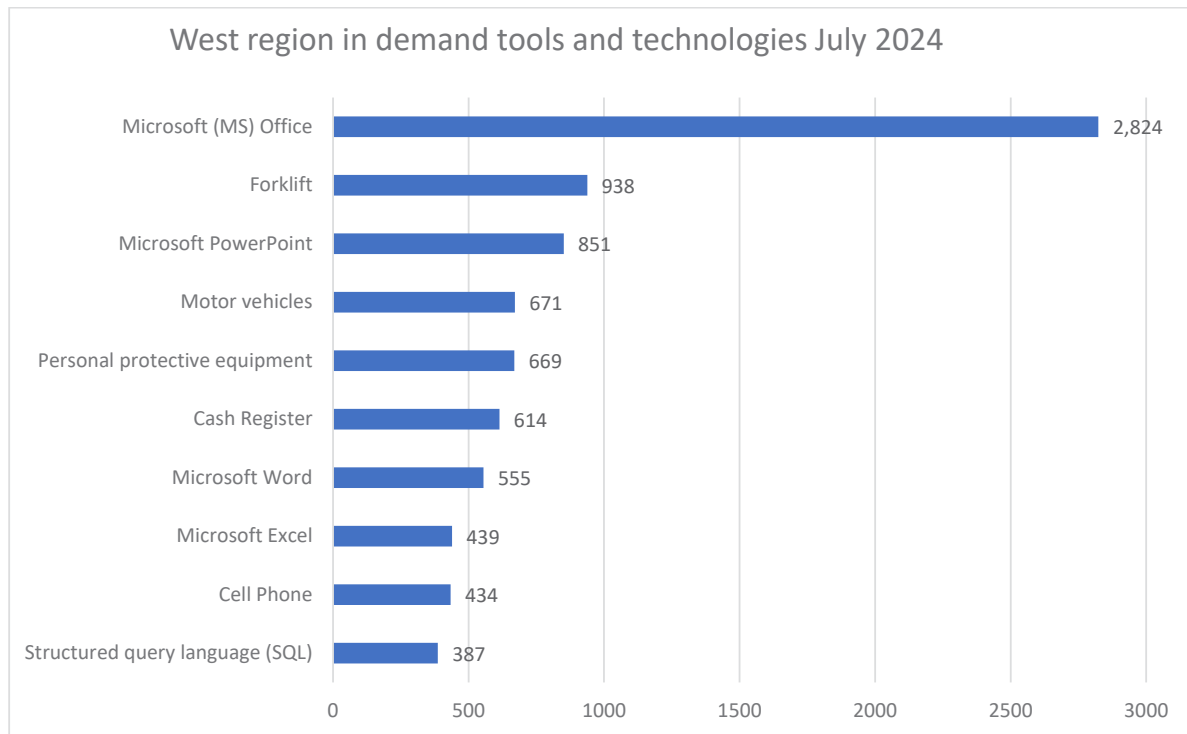
West TN Region Occupational Group	May 2015 Jobs	May 2023 Jobs	Change in Jobs	% Change in Jobs	2023 Median Hourly Earnings
Architecture and Engineering Occupations	8,610	8,520	-90	-1%	35.89
Arts, Design, Entertainment, Sports, and Media Occupations	5,810	6,120	310	5%	20.93
Building and Grounds Cleaning and Maintenance Occupations	18,590	17,590	-1,000	-5%	15.51
Business and Financial Operations Occupations	31,460	34,620	3,160	10%	31.12
Community and Social Service Occupations	9,940	10,240	300	3%	23.12
Computer and Mathematical Occupations	12,830	13,620	790	6%	39.82
Construction and Extraction Occupations	22,320	24,240	1,920	9%	22.74
Educational Instruction and Library Occupations	36,820	36,450	-370	-1%	24.65
Farming, Fishing, and Forestry Occupations	2,440	2,260	-180	-7%	16.03
Food Preparation and Serving Related Occupations	53,180	56,660	3,480	7%	13.53
Healthcare Practitioners and Technical Occupations	47,670	46,780	-890	-2%	32.31
Healthcare Support Occupations	22,830	23,570	740	3%	15.34
Installation, Maintenance, and Repair Occupations	31,920	31,430	-490	-2%	24.27
Legal Occupations	3,630	3,690	60	2%	37.79
Life, Physical, and Social Science Occupations	4,050	4,590	540	13%	38.61
Management Occupations	40,210	43,010	2,800	7%	49.12
Office and Administrative Support Occupations	95,350	94,670	-680	-1%	19.27
Personal Care and Service Occupations	10,320	10,770	450	4%	13.98
Production Occupations	58,150	56,500	-1,650	-3%	18.82
Protective Service Occupations	21,860	23,250	1,390	6%	19.74
Sales and Related Occupations	56,420	55,070	-1,350	-2%	15.32
Transportation and Material Moving Occupations	105,090	102,910	-2,180	-2%	18.22

Source: TN Dept of Labor and Workforce, OEWS, May 2015 and May 2023



Source: Online advertised jobs data  
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Figure 16

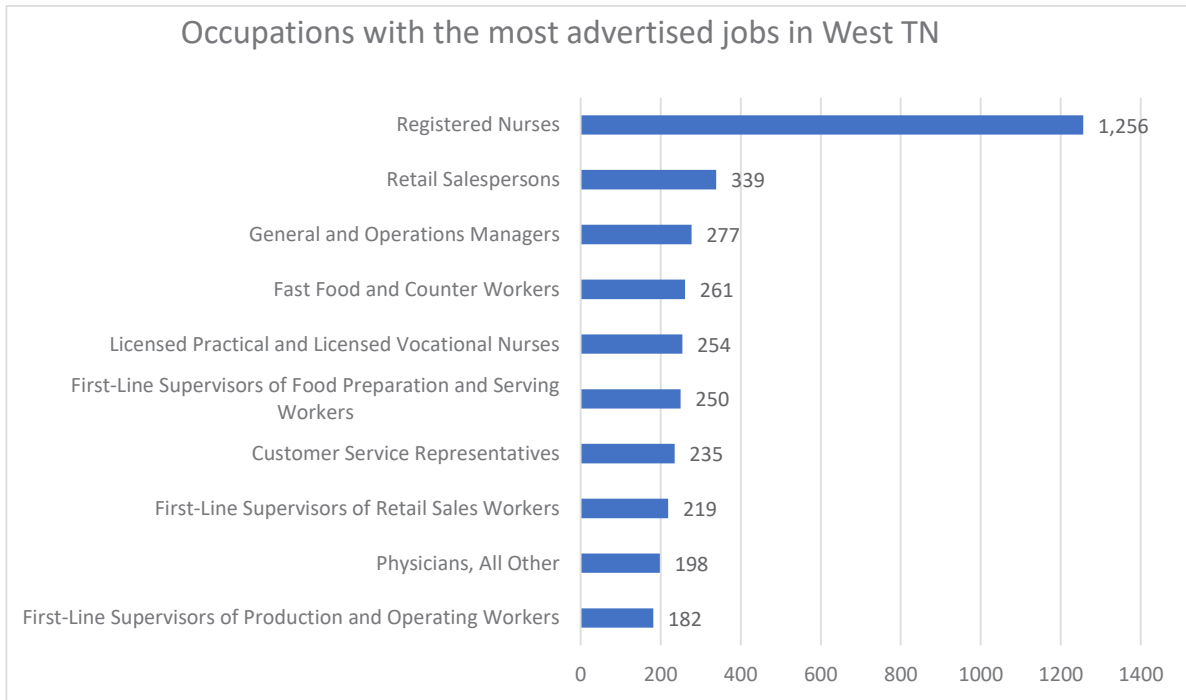


Source: Online advertised jobs data  
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Figure 17

**Table 11: West Region Top Employers by Job Openings**

Rank	Employer Name	Job Openings
1	Baptist Memorial Health Care Corporation	816
2	St. Jude Children's Research Hospital	520
3	West Tennessee Healthcare	427
4	Regional One Health	279
5	McDonald's Corporation	221
6	Sonic Corp.	207
7	Tennessee Board of Regents	190
8	Shelby County Schools	157
9	Tenet Healthcare Corporation	145
10	American Health Partners	143



Source: jobs4tn.gov Online Advertised Jobs, July 2024

**Table 12: West Region Labor Force**

	Southwest LWDA	Northwest LWDA	Greater Memphis LWDA	West Region	State Total
Total Population 2022	252,491	247,938	1,046,450	1,546,879	7,051,339
Total Population 2023	252,812	248,884	1,040,842	1,542,538	7,126,489
Male Population 2022	122,143	120,607	506,714	749,524	3,459,277
Female Population 2022	130,348	127,331	539,736	797,415	3,667,212
Labor Force Participation Rate 2022 (5-Year Estimate)	51.25%	53.96%	54.85%	53.4%	58.60%
Labor Force Participation Rate 2023 (5-Year Estimate)	54.20%	53.40%	56.70%	54.8%	59.50%
Annual Average Unemployment Rate 2022 Percent	3.8%	3.7%	4.4%	4.2%	3.4%
Annual Average Unemployment Rate 2023 Percent	3.7%	3.7%	4.3%	4.1%	3.3%
Educational Attainment 25 Years and Over (2022) Some College Or Higher - Percent	44.79%	45.04%	53.14%	47.7%	57.79%
Poverty Estimate, All Ages, Percent (2022)	18.10%	16.67%	17.35%	17.49%	14.00%
Percentage of Unemployed with a Disability (2022)	15.30%	21.00%	13.56%	16.6%	16.10%
Percent of Those Not in the Labor Force with a Disability (2022)	38.21%	39.80%	29.87%	36.0%	32.00%

Sources: TN Department of Labor and Workforce Development, WIRED Division, LAUS, and U.S. Census Bureau, ACS Five Year Estimates

**Table 13: Educational Attainment, 2022**

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	583,483	395,523	39,617	3,704,326	726,292	204,442
High school graduate only	186,677	144,371	9,896	1,170,342	246,808	57,346
Percent high school graduate only	31.99%	36.50%	24.98%	31.59%	33.98%	28.05%
High school graduate or higher	530,396	344,910	24,240	3,345,355	639,823	135,989
Percent high school graduate or higher	90.90%	87.20%	61.19%	90.31%	88.09%	66.52%
Bachelor's degree or higher	186,836	77,642	7,249	1,144,871	162,237	38,648
Percent bachelor's degree or higher	32.02%	19.63%	18.30%	30.91%	22.34%	18.90%

Sources: U.S. Census Bureau, ACS five-year estimate 2022

The labor force participation rate (LFPR) in the West Region in 2023 was 54.8 percent, which represents a small increase from 53.4 percent in 2022. For the state of Tennessee, the LFPR increased to 59.50 percent. The West Region's LFPR increased at a similar rate as the state LFPR. The region's increase in LFPR was largely due to two of the three LWDAs significantly increasing LFPR. Southwest and Greater Memphis LWDAs increased their LFPR at significantly higher rates than the state.

Unemployment rates remained higher than the average state rate in the West Region. Although there was a slight decrease from 4.2 percent in 2022 to 4.1 percent in 2023, this is still significantly higher than the state's 3.3 percent. This is a continuing trend from the previous year.

**Table 14: West Region Disability Status of Those in the Labor Force**

Area	Civilian Non institutional Population	Total Labor Force	Total Employed	Employed With Disability	Employed W/O Disability	Total Unemployed	Unemployed With Disability	Unemployed W/O Disability
Southwest LWDA	144,509	103,208	95,800	6,650	89,150	7,408	1,134	6,274
Northwest LWDA	142,383	99,710	95,049	8,277	86,772	4,661	979	3,682
Greater Memphis LWDA	629,774	482,392	448,218	26,996	421,222	34,174	4,636	29,538
West Region	916,666	685,310	639,067	41,923	597,144	46,243	6,749	39,494
Tennessee	4,170,846	3,174,114	3,016,358	200,005	2,816,353	157,756	25,408	132,348

Sources: U.S. Census Bureau, ACS five-year estimate 2022

The Southwest LWDA reported the lowest rate of educational attainment in 2023, with 44.8 percent of the population aged 25 years or more having some college or additional education. This is a decrease from 2021. Overall, the West Region displayed a lower level of educational achievement for adults with a bachelor's degree or higher aged 25 and above, than the state. The percent of individuals who identify as either Black or Latino who achieved a bachelor's degree aged 25 and above increased to 19.63% and 18.30% respectively. This displays a slight increase from 2021.

The poverty rate saw a slight increase in 2022 for the West Region. In 2022, the poverty rate for the region was 17.49 percent. Although this is an increase from last year, the long-term trend suggests a decline since 2020. The highest poverty rate in the region was in the Southwest LWDA at 18.10 percent. Although the poverty estimate for all LWDAs is still above the state's average, two out of the three LWDAs in the West region showed some improvement. Reducing poverty and increasing educational attainment remain key targets of workforce policy in this region.

**Table 15: West Region Disability Status of Those Not in the Labor Force**

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	144,509	41,301	15,782	25,519	38.21%	61.79%
Northwest LWDA	142,383	42,673	17,018	25,655	39.88%	60.12%
Greater Memphis LWDA	629,774	147,382	44,033	103,349	29.88%	70.12%
West Region	916,666	231,356	76,833	154,523	33.21%	66.79%
Tennessee	4,170,846	996,732	319,284	677,448	32.03%	67.97%

Sources: U.S. Census Bureau, ACS five-year estimates 2022

Like the state, about a third of those not in the labor force have a disability, with Northwest LWDA having the highest rate. As could be expected due to economic conditions in 2020, youth unemployment increased over the 2020 rate of 15.77 percent in the West Region in 2021. In 2022 youth unemployment decreased from 17.09 percent to 16.18. As the area continues to recover from the effects of the Covid-19 pandemic, youth unemployment is an area that is expected to experience improvement.

**Table 16: Youth Unemployment 2022**

Area	Labor Force	Unemployment	Rate
Southwest LWDA	17,872	2,738	15.32%
Northwest LWDA	16,601	1,839	11.08%
Greater Memphis LWDA	71,153	12,513	17.59%
West Region	105,626	17,090	16.18%

Sources: U.S. Census Bureau, ACS five-year estimates

**Table 17: Significant Barriers to Employment- West Region**

	Greater Memphis LWDA	Northwest LWDA	Southwest LWDA	West Region	State Total
Number of American Indians or Alaskan Natives alone	2,522	702	477	3,701	14,118
Population Ages 15-19	68,687	16,105	17,520	102,312	443,411
Population Ages 20-24	69,435	16,381	15,948	101,764	460,990
Population Ages 55+	286,629	82,624	82,633	451,886	2,061,038
Number of Veterans 2023	54,671	15,205	13,403	83,279	414,746
Number Below Poverty	179,529	39,939	43,536	263,004	943,538
Number With Disability	139,473	50,789	43,669	233,931	1,043,327
Number of Single Parent Families	40,485	6,664	7,538	54,687	182,176
Probationers and Parolees 2024	9,140	2,528	3,409	15,077	62,544
Community Correction 2024	367	141	442	950	3,377
Mental Health Court Statistics 2024	29	0	0	29	278
Limited English Speaking	6,263	619	468	7,350	41,562
Foster Care Services - Youth Aging Out 2024	119	22	22	163	854
Clients In Recovery Courts 2024	171	51	86	308	1,502
Disadvantaged Youth and Adults 2023	123,895	32,555	34,240	190,690	693,590
TANF 24 Months From 2024	460	72	98	630	1477
Prison Population 2024	1,886	5,204	0	7,090	19,056
Jail Population 2024	4,958	1470	1,565	7,993	31,508

**Sources: Population:** U.S. Census Bureau, 2017-2022 American Community Survey, 5-year Estimates.

**Probationers and Parolees:** Lisa Helton and Adam Dawson, TN Dept of Correction

**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, 2022

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

**TANF 24 Months from Ending Eligibility:** Lakecia Peterson and Rebecca Mungle, Division of Family Assistance and Child Support, TN Dept of Human Services

**Jail Population:** Jail Summary Report, TN Dept of Correction, Decision Support  
<https://www.tn.gov/content/dam/tn/correction/documents/JailJune2023.pdf>

**Prison Population:** Linda F. Booker, Tennessee Bed Space and Operating Capacity Report  
<https://www.tn.gov/content/dam/tn/correction/documents/BedJune2023.pdf>

## Middle Region's Economy, 2022-2023

Total employment in the Middle Region, increased from 1,325,718 to 1,369,675, an increase of 3.3 percent or 43,957 jobs . This increase in employment is congruent with the trend of the state of Tennessee. Last year the area showed an increase on employment as well. From 2022 to 2023 the Clarksville- Hopkinsville TN\_KY MSA added 2,500 jobs (2.5 percent growth) and the Nashville MSA added 32,900 jobs (2.9 percent growth) fueling economic growth in the region.

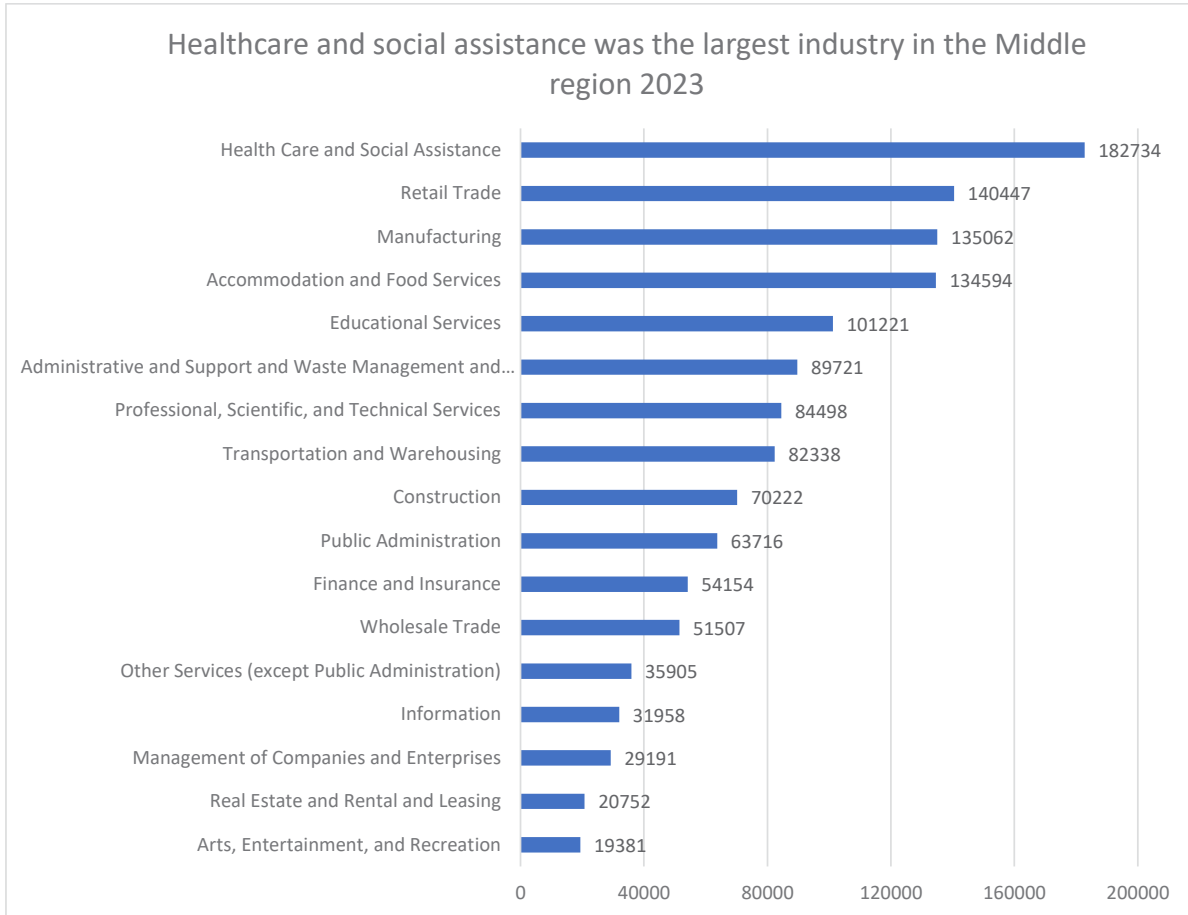
The Middle Region consists of three Local Workforce Development Areas: Northern Middle, Southern Middle, and Upper Cumberland, encompassing a total of 39 counties (see Appendix). The number of establishments showed an increase in 2023 to 102,926 from 97,982 in 2022. Total payroll in the Middle region increased to \$91.4B up from 85.9B from the previous year. This was the second consecutive year in which payroll increased at this pace in the Middle Region.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, was \$66,717, which represented a 21 percent increase from the previous year. This was the second consecutive year in which the Middle region's average annual salary increased at a rate greater than 20%. In 2023, the median occupational wage for the Middle region was \$45,406 This represented an increase of 9.3 percent from last year's \$41,530. This is a continuing trend for this region, as last year it also experienced a significant increase in wages.

Unemployment in the region was 2.9 percent in 2023, a decrease from 3.0 in 2022. Youth unemployment in 2022 (the latest available) remained below the state average at 8.43 percent. The percent of those individuals who are unemployed with a disability also fell in the Middle region to 15.41 percent. This represents a slight decrease in from the year prior. The percent of individuals not in the labor force with a disability also declined to 28.1 from 32.1 in the region last year. This percent is also slightly lower than the state of Tennessee's.

**To summarize:** In 2023 compared to 2022, the Middle Region saw an increase in employment.

Payroll increased, at a similar pace than it did in the region in the previous year. This was also the case for the median wage in the region, which saw a more significant increase than in the previous year. In 2023, unemployment rates overall and for youth and those in poverty remained lower than state rates.



Source: TN Department of Labor and Workforce Development, WIRED Division, QCEW July 2024

Figure 19

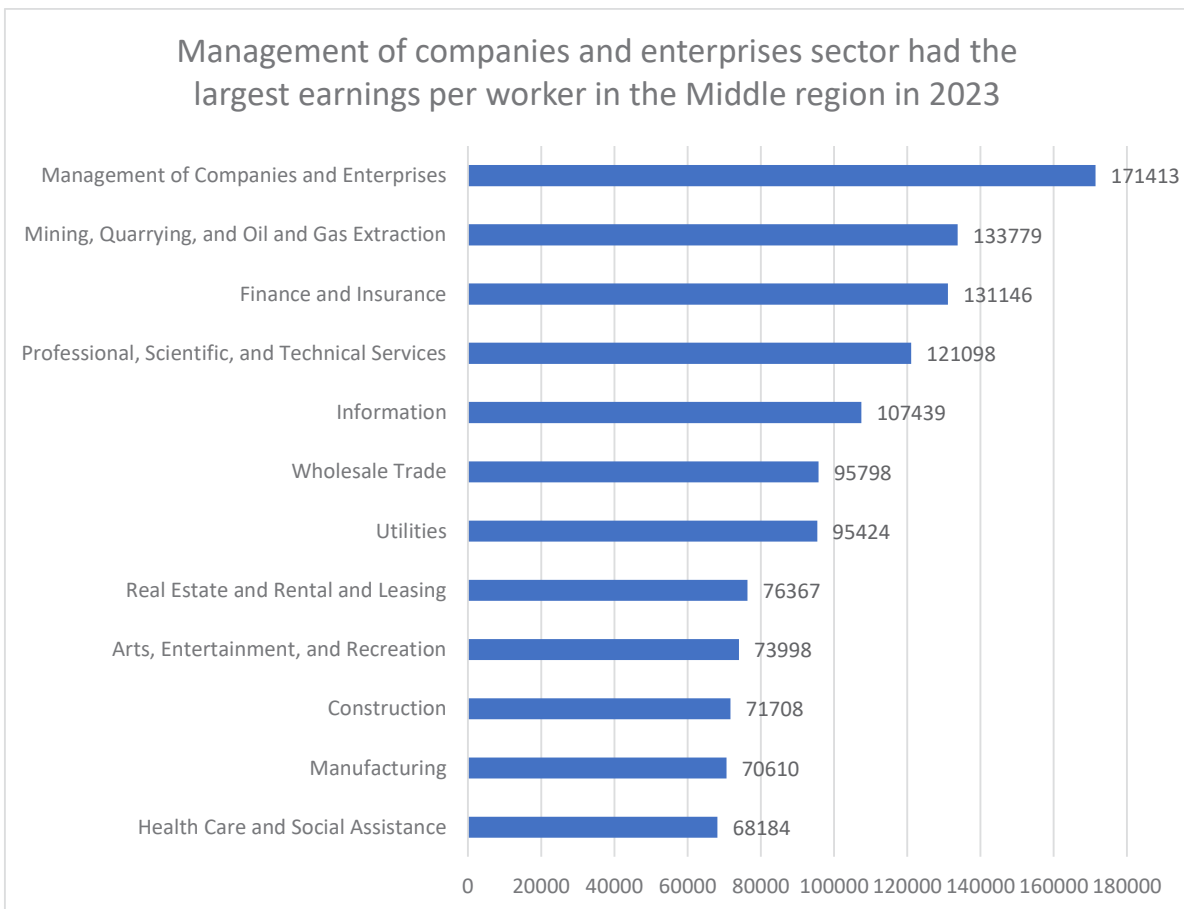
## Middle TN Industry Employment and Wages (2018-2023)

Total employment in the Middle Region in 2023 was 1,369,675. The five largest industry sectors in 2023 were:

- Health care and social assistance (182,734 jobs)
- Retail trade (140,447)
- Manufacturing (135,062)
- Accommodation and Food Services (134,594)

- Educational Services (101,221)

Compared to 2018, the industries adding the most workers include transportation and warehousing (over 20,000 new jobs). Professional, scientific, and technical services and construction have both added over 15,000 jobs each since 2018, with health care and social assistance adding nearly 14,000. Although it is the region's fourth largest industry by employment, manufacturing is the only industry sector that lost employment in the Middle Region since 2018. However, a year-by-year analysis indicates a slow recovery as projects expand. All industry sectors saw a nominal increase from their pre-pandemic earnings per worker, except for arts, entertainment, and recreation. The largest increases in earnings per worker were in the mining, quarrying, and oil and gas expansion, management of companies and enterprises and information industry sectors. These three industries have seen their earnings per worker increase more than 45 percent from the pre-pandemic earnings. The industries with the highest earnings per worker were management of companies and enterprises, mining, and finance and insurance.



Source: TN Department of Labor and Workforce Development, WIRED Division, QCEW, July 2024

Figure 20

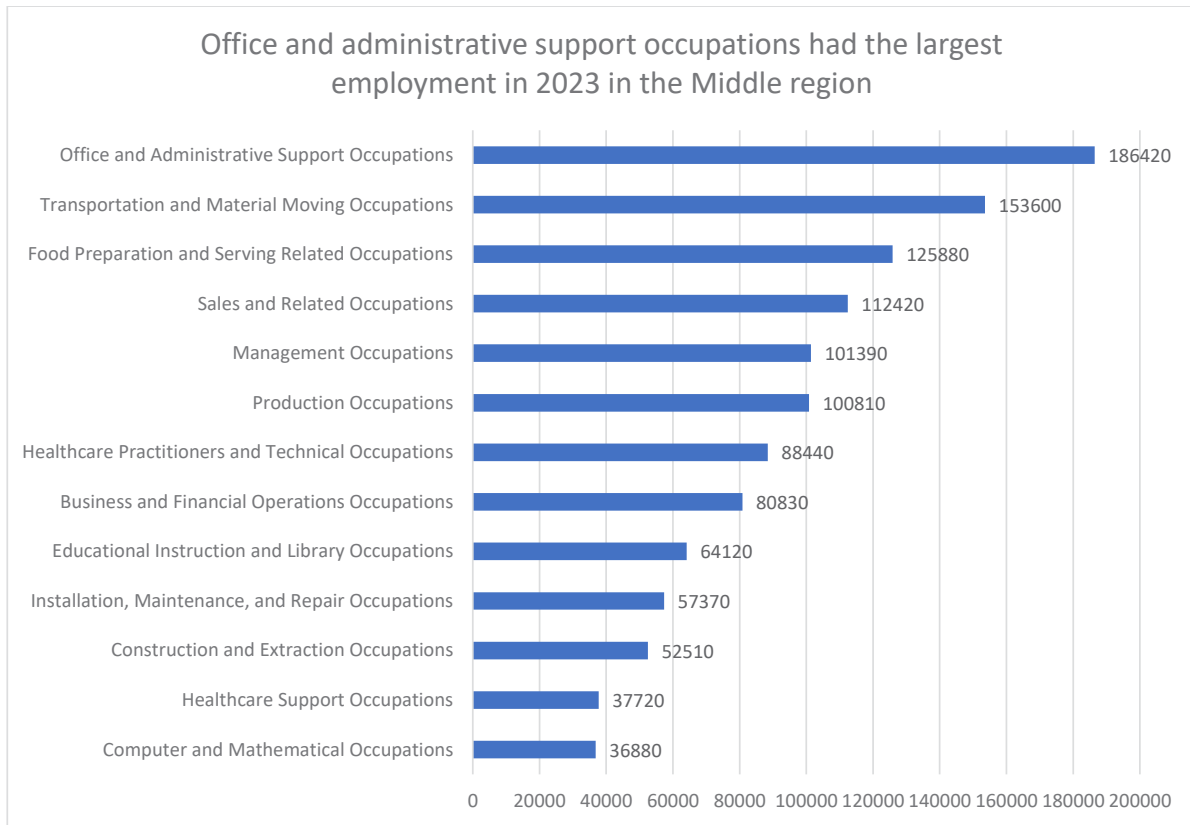
**Table 18: Fastest Growing Industries in the Middle Region are Transportation and Warehousing and Information**

Middle Region Industries	2018 Jobs	2023 Jobs	Change in Jobs	% Change in Jobs	2018 Earnings Per Worker	2023 Earnings Per Worker	% Change in Earnings Per Worker
Accommodation and Food Services	127,583	134,594	7,011	5%	20,837.80	28,121.99	35%
Administrative and Support and Waste Management and Remediation Services	89,231	89,721	490	1%	37,439.42	55,181.86	47%
Agriculture, Forestry, Fishing and Hunting	3,151	3,370	219	7%	33,960.20	41,589.53	22%
Arts, Entertainment, and Recreation	17,339	19,381	2,042	12%	76,407.32	73,997.91	-3%
Construction	55,189	70,222	15,033	27%	58,636.95	71,708.12	22%
Educational Services	93,940	101,221	7,281	8%	44,467.36	53,515.44	20%
Finance and Insurance	50,898	54,154	3,256	6%	90,548.57	131,145.73	45%
Health Care and Social Assistance	168,988	182,734	13,746	8%	56,048.13	68,183.88	22%
Information	24,247	31,958	7,711	32%	72,040.91	107,439.18	49%
Management of Companies and Enterprises	23,081	29,191	6,110	26%	114,324.21	171,412.81	50%
Manufacturing	135,930	135,062	-868	-1%	57,468.46	70,609.51	23%
Mining, Quarrying, and Oil and Gas Extraction	1,682	1,971	289	17%	83,481.72	133,778.68	60%
Other Services (except Public Administration)	34,579	35,905	1,326	4%	35,261.28	48,470.45	37%
Professional, Scientific, and Technical Services	69,281	84,498	15,217	22%	88,958.21	121,098.31	36%
Public Administration	61,889	63,716	1,827	3%	50,057.19	63,309.68	26%
Real Estate and Rental and Leasing	19,490	20,752	1,262	6%	53,455.13	76,366.75	43%
Retail Trade	136,210	140,447	4,237	3%	32,758.24	41,565.28	27%
Transportation and Warehousing	62,057	82,338	20,281	33%	48,821.14	61,173.83	25%
Utilities	6,940	7,484	544	8%	75,741.87	95,423.63	26%
Wholesale Trade	45,591	51,507	5,916	13%	73,210.30	95,797.62	31%

Source: TN Dept of Labor and Workforce, QCEW

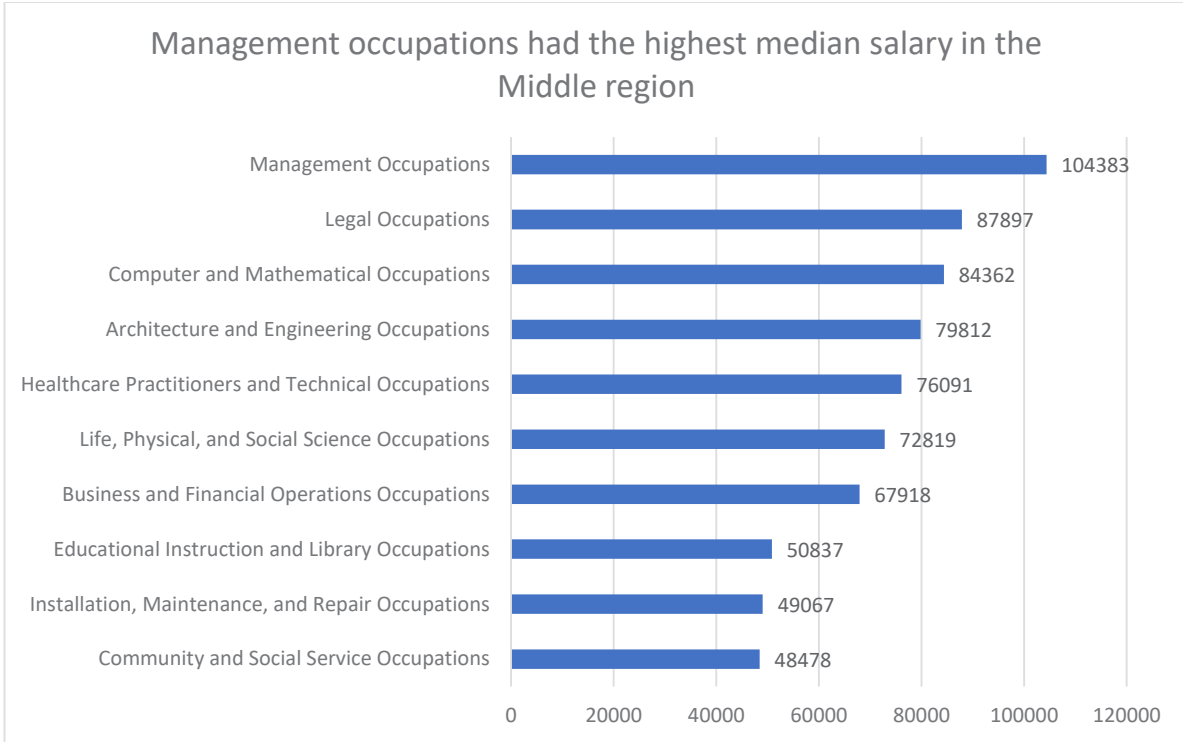
## Middle Region Occupational Employment

The office and administrative support occupational group remains the largest in the Middle Region, according to the Occupational Employment and Wages Survey for 2023, which provides data on all industries except agriculture and the self-employed. Employment in this group in May 2023 was 186,420, decreasing employment by 3,000 jobs over the 8-year period. Transportation and material moving occupations, food preparation, and sales occupations were next in total numbers of jobs. The highest percentages of job growth were in the business and financial, transportation and material moving, and computer and mathematical major job groups.



Source: TN Department of Labor and Workforce Development, WIRED Division, OEWS, May 2023, top occupational groups by employment

Figure 21



Source: TN Department of Labor and Workforce Development, WIRED, OEWS, May 2023, top occupational groups by salary

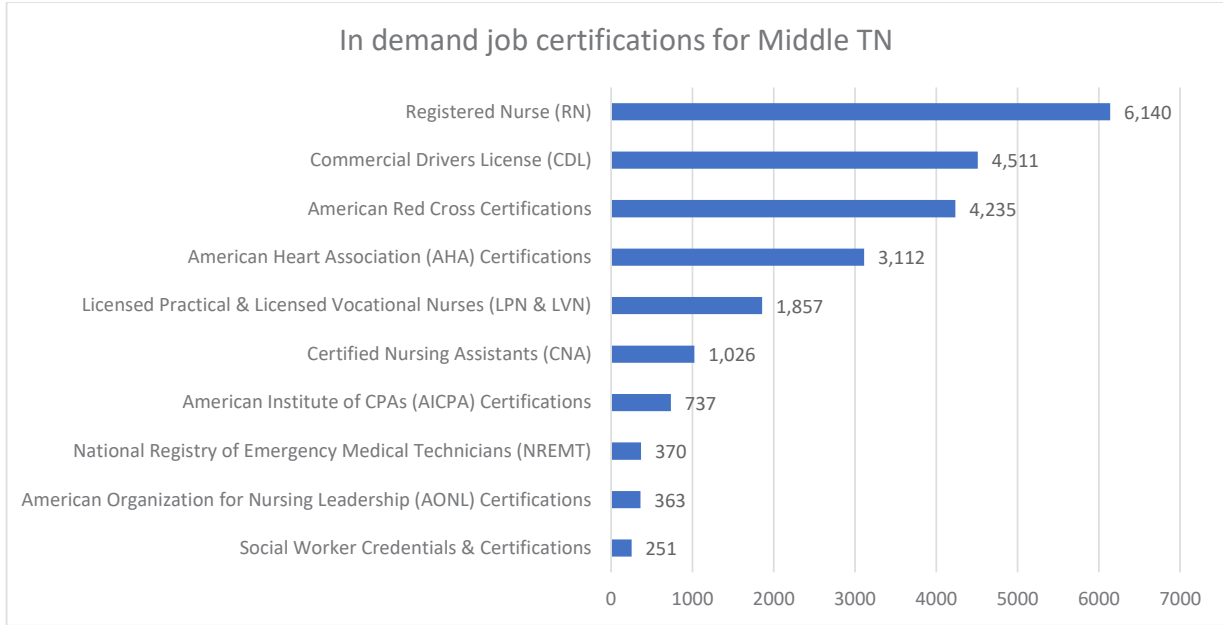
Figure 22

The TDLWD jobs4tn.gov web site tracks the top in-demand job certifications and tools and technologies from its advertised jobs database, updated every day. The table below shows the most requested certifications, including CPR, nursing credentials, and commercial driver license certifications. For July 2024, most requested technologies in the Middle Region include facility with Microsoft Office and Power Point, Word, and SQL query language, operation of cash registers and forklifts, and use of personal protective equipment. Of the top 10 employers posting jobs in the Middle Region in July 2024, 8 included hospitals and other healthcare institutions. Reflecting the top occupational groups and those adding the newest jobs, top job postings in the region included healthcare practitioners and technical occupations, management, transportation, and material moving, sales, office, and food preparation.

**Table 19: Middle Region Occupational Job Growth 2015-2023**

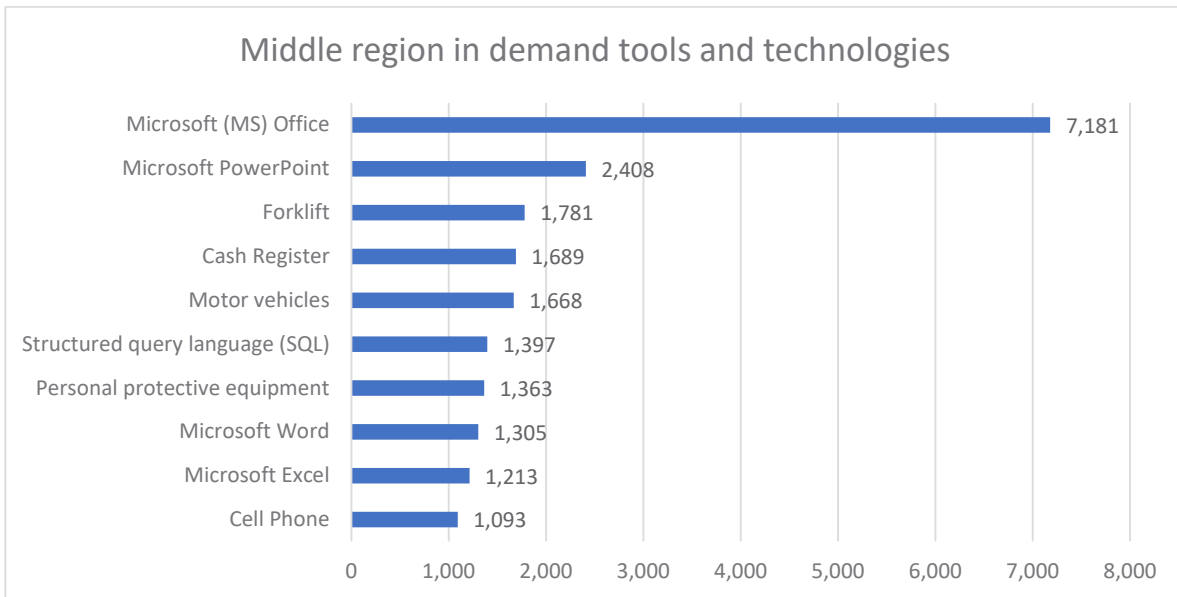
Middle TN Region Occupational Group	May 2015 Jobs	May 2023 Jobs	Change in Jobs	% Change in Jobs	2023 Median Hourly Earnings
Architecture and Engineering Occupations	16,690	15,040	-1,650	-10%	38.37
Arts, Design, Entertainment, Sports, and Media Occupations	15,140	19,350	4,210	28%	22.59
Building and Grounds Cleaning and Maintenance Occupations	29,020	32,700	3,680	13%	16.41
Business and Financial Operations Occupations	48,390	80,830	32,440	67%	32.65
Community and Social Service Occupations	12,130	16,950	4,820	40%	23.31
Computer and Mathematical Occupations	23,120	36,880	13,760	60%	40.56
Construction and Extraction Occupations	34,270	52,510	18,240	53%	23.23
Educational Instruction and Library Occupations	59,690	64,120	4,430	7%	24.44
Farming, Fishing, and Forestry Occupations	1,330	1,720	390	29%	17.38
Food Preparation and Serving Related Occupations	103,380	125,880	22,500	22%	14.32
Healthcare Practitioners and Technical Occupations	70,080	88,440	18,360	26%	36.58
Healthcare Support Occupations	31,460	37,720	6,260	20%	17.29
Installation, Maintenance, and Repair Occupations	48,500	57,370	8,870	18%	23.59
Legal Occupations	6,830	8,960	2,130	31%	42.26
Life, Physical, and Social Science Occupations	5,640	8,350	2,710	48%	35.01
Management Occupations	72,020	101,390	29,370	41%	50.18
Office and Administrative Support Occupations	189,450	186,420	-3,030	-2%	20.48
Personal Care and Service Occupations	25,270	24,920	-350	-1%	14.40
Production Occupations	104,070	100,810	-3,260	-3%	19.97
Protective Service Occupations	23,890	30,030	6,140	26%	20.89
Sales and Related Occupations	111,400	112,420	1,020	1%	16.74
Transportation and Material Moving Occupations	92,170	153,600	61,430	67%	18.28

Source: TN Dept of Labor and Workforce, OEWS, May 2015 and May 2023



Source: Online advertised jobs data

Figure 23



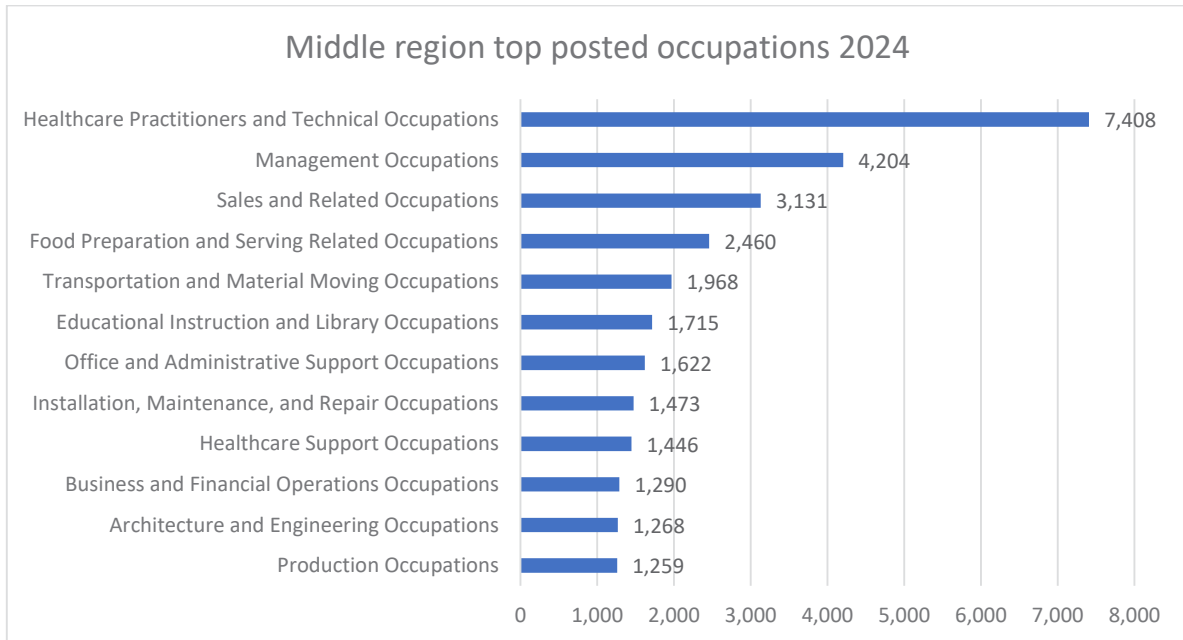
Source: Online advertised jobs data

Figure 24

**Table 20: Middle Region Top Employers by Number of Job Openings**

Rank	Employer Name	Job Openings
1	Metropolitan Nashville Public Schools	1,356
2	Vanderbilt University Medical Center	1,291
3	Ascension	655
4	HCA Healthcare, Inc.	577
5	CrowdStrike	572
6	The Kroger Co.	448
7	National HealthCare Corporation	380
8	McDonald's Corporation	348
9	Sonic Corp.	348
10	LHC Group, Inc.	315

Source: Online advertised jobs data  
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Source: Online advertised jobs data  
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Figure 25

**Table 21: Middle Region Labor Force**

Column 1	Upper Cumberland LWDA	Southern Middle LWDA	Northern Middle LWDA	Middle Region	State Total
Total Population 2022	372,024	481,777	2,153,724	3,007,525	7,051,339
Total Population 2023	378,274	489,664	2,185,289	3,053,227	7,126,489
Male Population 2022	181,451	239,136	1,043,727	1,464,314	3,459,277
Female Population 2022	190,573	242,641	1,109,997	1,543,211	3,667,212
Labor Force Participation Rate 2022 (5-Year Estimate)	52.10%	56.90%	67.20%	58.73%	58.60%
Labor Force Participation Rate 2023 (5-Year Estimate)	51.40%	56.30%	66.80%	58.17%	59.50%
Annual Average Unemployment Rate 2022 Percent	3.7%	3.3%	2.8%	3.0%	3.4%
Annual Average Unemployment Rate 2023 Percent	3.7%	3.2%	2.7%	2.9%	3.3%
Educational Attainment 25 Years and Over (2022) Some College Or Higher - Percent	43.70%	48.18%	66.54%	60.62%	57.79%
Poverty Estimate, All Ages, Percent (2022)	16.46%	13.49%	10.81%	11.96%	14.00%
Percentage of Unemployed with a Disability (2022)	18.57%	17.76%	14.43%	15.41%	16.10%
Percent of Those Not in the Labor Force with a Disability (2022)	36.42%	33.38%	24.75%	28.13%	32.00%

Source: TN Department of Labor and Workforce Development, WIRED Division, LAUS, and U.S. Census Bureau, ACS five-year estimates

**Table 22: Educational Attainment, 2022**

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	1,289,065	236,140	109,278	3,704,326	726,292	204,442
High school graduate only	402,779	69,735	32,371	1,170,342	246,808	57,346
Percent high school graduate only	31.25%	29.53%	29.62%	31.59%	33.98%	28.05%
High school graduate or higher	1,170,168	212,276	76,766	3,345,355	639,823	135,989
Percent high school graduate or higher	90.78%	89.89%	70.25%	90.31%	88.09%	66.52%
Bachelor's degree or higher	414,091	66,618	21,736	1,144,871	162,237	38,648
Percent bachelor's degree or higher	32.12%	28.21%	19.89%	30.91%	22.34%	18.90%

Sources: U.S. Census Bureau, ACS five-year estimate 2022

The labor force participation rate (LFPR) in the Middle Region in 2023 was 58.17 percent, which represents a small decrease from 2022. For the state of Tennessee, LFPR increased to 59.50 percent. While the Middle Region's LFPR decreased, this represents a tendency that is contrary to state's LFPR. Two LWDA in the Middle region, including Northern Middle, the largest LWDA in the region decreased in LFPR. Unemployment rates remained lower than the average state rate in the Middle Region. The region's unemployment rate decreased from 3.0 in 2022 to 2.9 percent in 2023. This trend follows the state trend, as unemployment in Tennessee declined to 3.3 percent in 2023.

**Table 23: Middle Region Disability Status of Those in the Labor Force**

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	209,943	149,311	142,579	10,886	131,693	6,732	1,250	5,482
Southern Middle LWDA	273,381	204,187	195,553	13,540	182,013	8,634	1,534	7,100
Northern Middle LWDA	1,309,005	1,052,617	1,010,041	62,321	947,720	42,576	6,147	36,429
Middle Region	1,792,329	1,406,115	1,348,173	86,747	1,261,426	57,942	8,931	49,011
Tennessee	4,170,846	3,174,114	3,016,358	200,005	2,816,353	157,756	25,408	132,348

Sources: U.S. Census Bureau, ACS five-year estimate 2022

The Upper Cumberland LWDA reported the lowest rate of educational attainment in 2023, with 43.7 percent of the population aged 25 years or more having some college or additional education. This is a decrease from 2022 as well. Overall, the Middle Region displays a higher level of educational achievement for adults with a bachelor's degree or higher aged 25 and above than the state, although just one of the areas has increased their rates of attainment since 2021. The Northern Middle LWDA's educational attainment is significantly larger than the state's. The percent of individuals who identify as Black had a similar attainment rate in 2022 as in 2021; the percent of Latinos who achieved a bachelor's degree aged 25 and above increased to 19.89%. This displays a slight increase from 2021.

The poverty rate saw a significant decrease in 2022 for the Middle Region. In 2022, the poverty rate for the region was over 11 percent. This continues a trend set in the region in the previous years. The highest poverty rate in the region was in the Upper Cumberland LWDA at 16.46 percent. Reducing poverty and increasing educational attainment remain key targets of workforce policy in this LWDA. The remaining LWDA's in this region show poverty estimates that are below the state average.

**Table 24: Disability Status of Those Not in the Labor Force, 2022**

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	209,943	60,632	22,081	38,551	36.42%	63.58%
Southern Middle LWDA	273,381	69,194	23,097	46,097	33.38%	66.62%
Northern Middle LWDA	1,309,005	256,388	63,466	192,922	24.75%	75.25%
Middle Region	1,792,329	386,214	108,644	277,570	28.13%	71.87%
Tennessee	4,170,846	996,732	319,284	677,448	32.03%	67.97%

Sources: U.S. Census Bureau, ACS five-year estimate 2022

Like the state, about a third of those not in the labor force have a disability, with Upper Cumberland LWDA having the highest rate. In 2022 youth unemployment decreased from 9.89 in 2021 percent to 8.47 . As the area continues to recover from the effects of the Covid-19 pandemic, youth unemployment is an area that is expected to experience improvement.

**Table 25: Youth Unemployment 2022**

Area	Labor Force	Unemployment	Rate
Upper Cumberland LWDA	25,237	2,283	9.05%
Southern Middle LWDA	30,645	2,533	8.27%
Northern Middle LWDA	165,212	13,818	8.36%
Middle Region	221,094	18,634	8.43%

Source: U.S. Census Bureau, ACS five-year estimates

**Table 26: Significant Barriers to Employment**

	Northern Middle TN LWDA	Southern Middle TN LWDA	Upper Cumberland LWDA	Middle Region	State Total
Number of American Indians or Alaskan Natives alone	5,299	1,187	862	7,348	14,118
Population Ages 15-19	136,026	30,260	22,165	188,451	443,411
Population Ages 20-24	146,983	27,187	23,594	197,764	460,990
Population Ages 55+	523,601	147,594	126,015	797,210	2,061,038
Number of Veterans 2023	115,168	30,078	23,190	168,436	414,746
Number Below Poverty	221,729	61,435	58,358	341,522	943,548
Number With Disability	241,987	73,565	66,801	382,353	1,043,327
Number of Single Parent Families	53,629	11,407	7,711	72,747	182,176
Probationers and Parolees 2024	19,844	3,784	3,190	26,818	62,544
Community Correction 2024	1,636	5	106	1,747	3,377
Mental Health Court Statistics 2024	156	10	24	190	278
Limited English Speaking	22,062	1,231	1,101	24,394	41,562
Foster Care Services - Youth Aging Out 2024	221	79	63	363	854
Clients In Recovery Courts 2024	372	82	103	557	1,502
Disadvantaged Youth and Adults 2023	157,655	45,750	40,300	243,705	693,590
TANF 24 Months from 2024	298	83	55	436	1,477
Prison Population 2024	4,261	2,439	0	6,700	19,056
Jail Population 2024	6,923	2,231	1,858	11,012	31,508

**Sources: Population:** U.S. Census Bureau, 2017-2022 American Community Survey, 5-year Estimates.**Probationers and Parolees:** Lisa Helton and Adam Dawson, TN Dept of Correction

**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, 2022

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

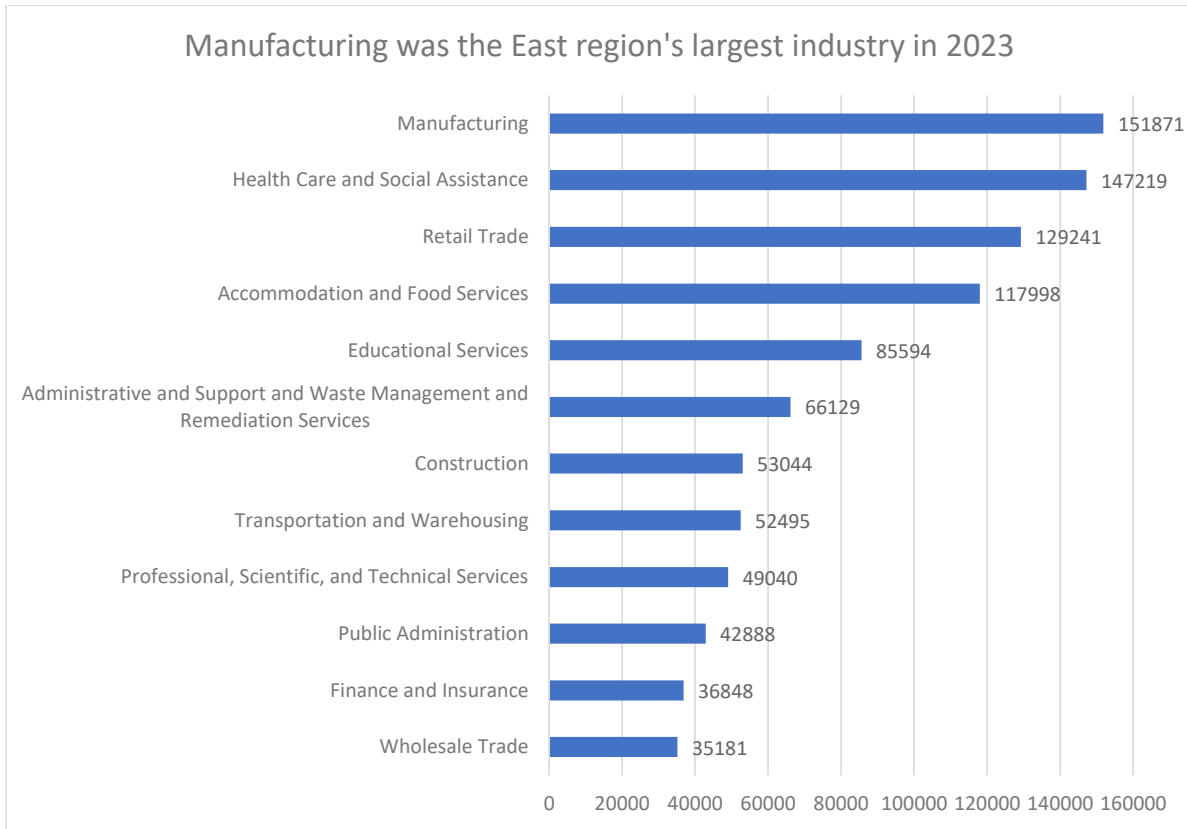
**TANF 24 Months from Ending Eligibility:** Lakecia Peterson and Rebecca Mungle, Division of Family Assistance and Child Support, TN Dept of Human Services

**Jail Population:** Jail Summary Report, TN Dept of Correction, Decision Support  
<https://www.tn.gov/content/dam/tn/correction/documents/JailJune2023.pdf>

**Prison Population:** Linda F. Booker, Tennessee Bed Space and Operating Capacity Report

## East Region's Economy, 2022-2023

Total employment in the East Region increased from 1,031,985 to 1,055,216, a growth rate of 2.2 percent or 23,231 jobs, continuing its pattern of expansion from the previous year.



Source: TN Department of Labor and Workforce Development, WIRED Division, QCEW, July 2024

Figure 26

Rapid employment growth in the Chattanooga MSA (4.2 percent), as well as steady growth in Knoxville (1.8 percent) and the Kingsport-Bristol TN-VA MSA (1.6 percent) fueled the regional growth trend.

The East Region consists of three Local Workforce Development Areas: East, Northeast, and Southeast, encompassing a total of 34 counties (see Appendix). The number of establishments showed an increase in 2023 to 70,461 from 67,643 the previous year. Total payroll in the East region increased to \$61.8B up from \$58.1B from the year before. This is the second consecutive year in which this region has seen an increase in payroll.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, was \$58,545, which represented an increase from the previous year. Although the region's average annual industry wage showed an increase it was a much smaller rate, 3.8 percent, than that of the other two regions in the state, both of which grew by over 20%.

Unemployment in the East region was 3.4 percent in 2023, which remained unchanged from the year prior. Youth unemployment in 2022 (the latest available) remained below the state average at 9.39 percent. The percent of those individuals who are unemployed with a disability also rose in the East region to 18.15 percent. This represents an increase from 17.5 percent in 2022. However, the percent of individuals not in the labor force with a disability declined to 35.29% from 37.5% in the region last year, still above the state rate of 32 percent.

**To summarize:** In 2023 compared to 2022, the East Region saw an increase in employment. Payroll increased at a similar pace as in the region the previous year. However, the annual average industry wage for the East region grew at a significantly lower rate than it did in the other two regions. In 2023, the unemployment rate for youth and the percent of those in poverty remained lower than state rates. The East Region unemployment rate in general remained unchanged and just slightly above the state rate.

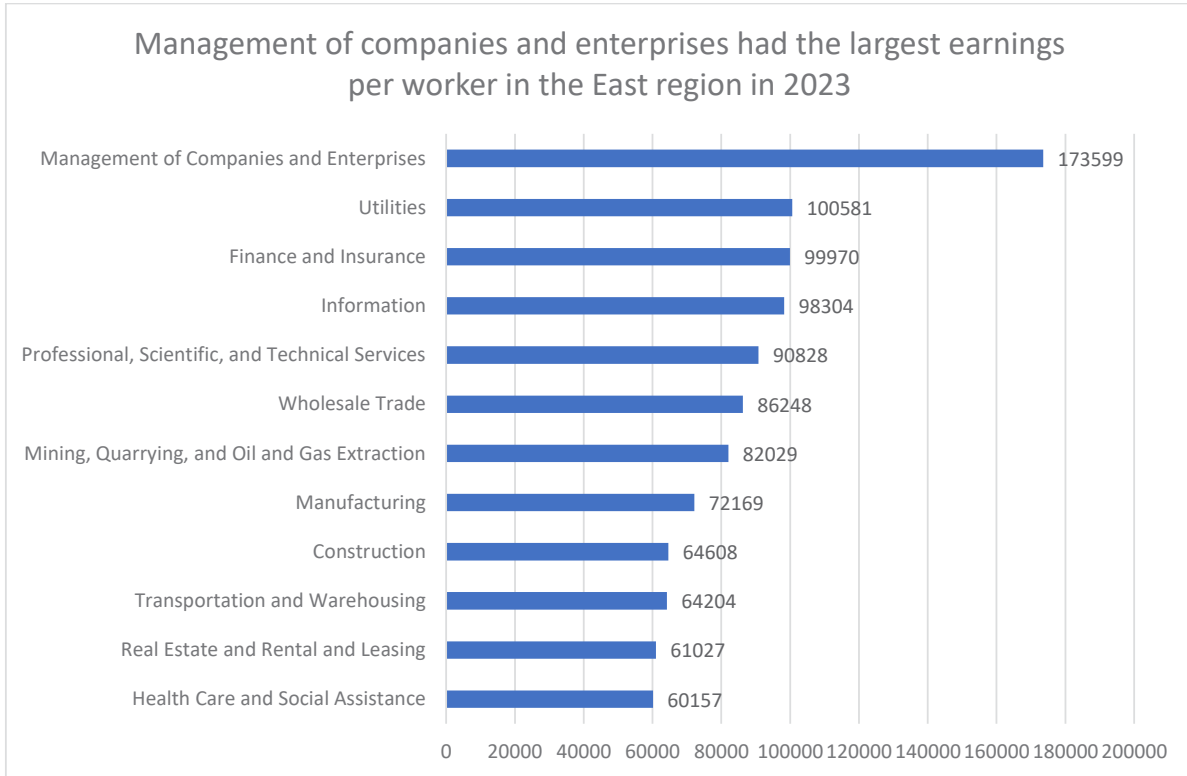
## East TN Industry Employment and Earnings (2018-2023)

Total annual average employment in the East region in 2023 was 1,055, 216. 8,603. The five largest industry sectors :

- Manufacturing ( 152,632 jobs)
- Healthcare and Social Assistance 141,280
- Retail Trade (126,151)
- Accommodation and Food Services ( (114,089))
- Educational Services (81,765)

Compared to 2018, the industries adding the most workers during 2023 included manufacturing (10,265 new jobs) and professional, scientific, and technical services (7,901 new jobs). The healthcare and social assistance industry sector has now grown 2% since 2018. Last year, this sector was still being reported as showing negative pre-pandemic growth. Having grown 2%

over the pre-pandemic level is significant for this industry in this region. All industry sectors saw an increase from their pre-pandemic earnings per worker. The East and West regions both had an increase of earnings per worker in all industries. The largest increases in earnings per worker were in the management , finance and insurance, and arts and recreation industry sectors. These three industries have seen their earnings per worker increase 50 percent or more from their pre-pandemic earnings. The industries with the highest earnings per worker were management of companies and enterprises, utilities, and finance and insurance.



Source: TN Department of Labor and Workforce Development, WIRED Division, QCEW, July 2024

Figure 27

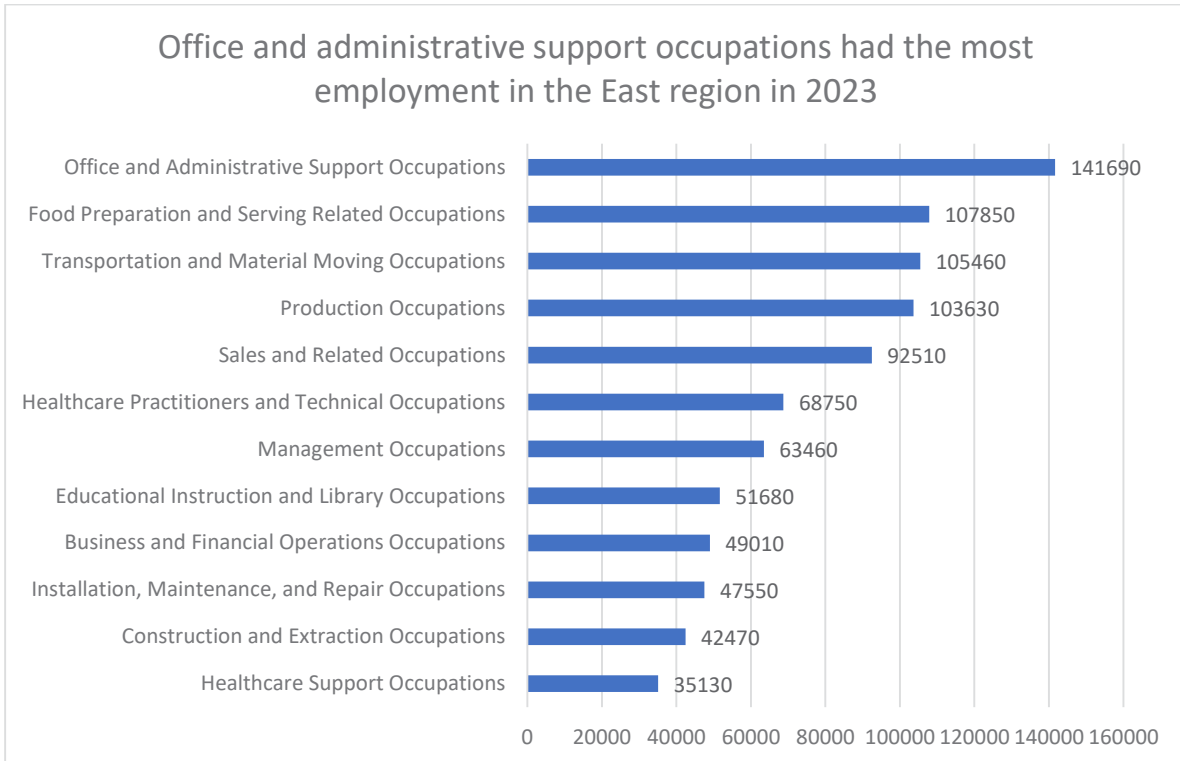
**Table 27: Fastest Growing Industries in the East Region Include: Professional, Scientific, Technical Services, Agriculture, and Construction**

East Region Industries	2018 Jobs	2023 Jobs	Change in Jobs	% Change in Jobs	2018 Earnings Per Worker	2023 Earnings Per Worker	% Change in Earnings Per Worker
Accommodation and Food Services	110,727	114,089	3,362	3%	18,321	23,594.00	29%
Administrative and Support and Waste Management and Remediation Services	67,764	66,835	-929	-1%	34,927	45,588.48	31%
Agriculture, Forestry, Fishing and Hunting	2,026	2,380	354	17%	34,516	38,403.99	11%
Arts, Entertainment, and Recreation	15,925	14,980	-945	-6%	23,025	35,582.82	55%
Construction	44,475	50,434	5,959	13%	52,472	64,607.59	23%
Educational Services	77,868	81,765	3,897	5%	42,488	48,519.47	14%
Finance and Insurance	34,168	35,913	1,745	5%	66,101	99,970.23	51%
Health Care and Social Assistance	138,873	141,280	2,407	2%	50,471	60,156.98	19%
Information	12,274	11,888	-386	-3%	78,303	98,303.70	26%
Management of Companies and Enterprises	16,166	13,590	-2,576	-16%	85,520	173,598.76	103%
Manufacturing	142,367	152,632	10,265	7%	59,727	72,168.86	21%
Mining, Quarrying, and Oil and Gas Extraction	1,464	1,491	27	2%	62,257	82,029.27	32%
Other Services (except Public Administration)	27,077	26,791	-286	-1%	31,952	41,833.79	31%
Professional, Scientific, and Technical Services	40,503	48,404	7,901	20%	75,192	90,827.77	21%
Public Administration	41,807	41,560	-247	-1%	47,902	58,530.03	22%
Real Estate and Rental and Leasing	11,483	12,552	1,069	9%	43,906	61,027.41	39%
Retail Trade	121,429	126,151	4,722	4%	29,007	37,640.98	30%
Transportation and Warehousing	46,113	51,790	5,677	12%	50,320	64,204.33	28%
Utilities	10,585	11,195	610	6%	91,079	100,581.41	10%
Wholesale Trade	30,613	34,613	4,000	13%	65,246	86,247.85	32%

Source: TN Dept of Labor and Workforce, QCEW Annual Averages, 2018 and 2023

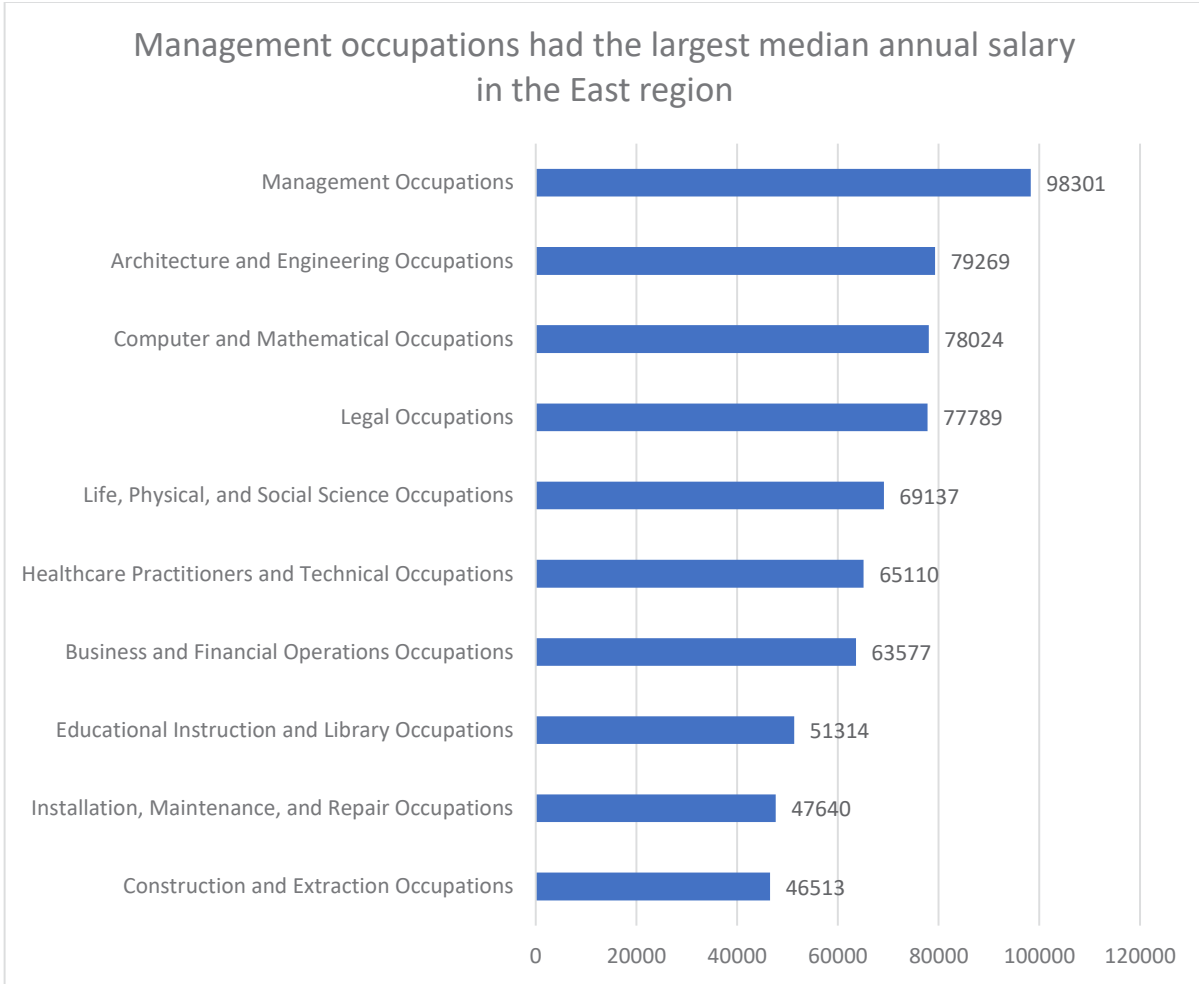
## East Region Occupational Employment

The office and administrative support occupational group remains the largest in the East region, according to the Occupational Employment and Wages Survey for 2023, which provides data on all industries except agriculture and the self-employed. Employment in this group in May 2023 was 141,690, which lost more than 16,000 jobs since May 2015. Transportation and material moving occupations, food preparation and serving, and production occupations were next in total numbers of jobs.



Source: TN Department of Labor and Workforce Development, WIRED Division, OEWS, May 2023, top occupational groups by employment

Figure 28



Source: TN Department of Labor and Workforce Development, WIRED Division, OEWS, May 2023, top occupational groups by salary

Figure 29

**Table 28: East Region Job Growth 2015-2023**

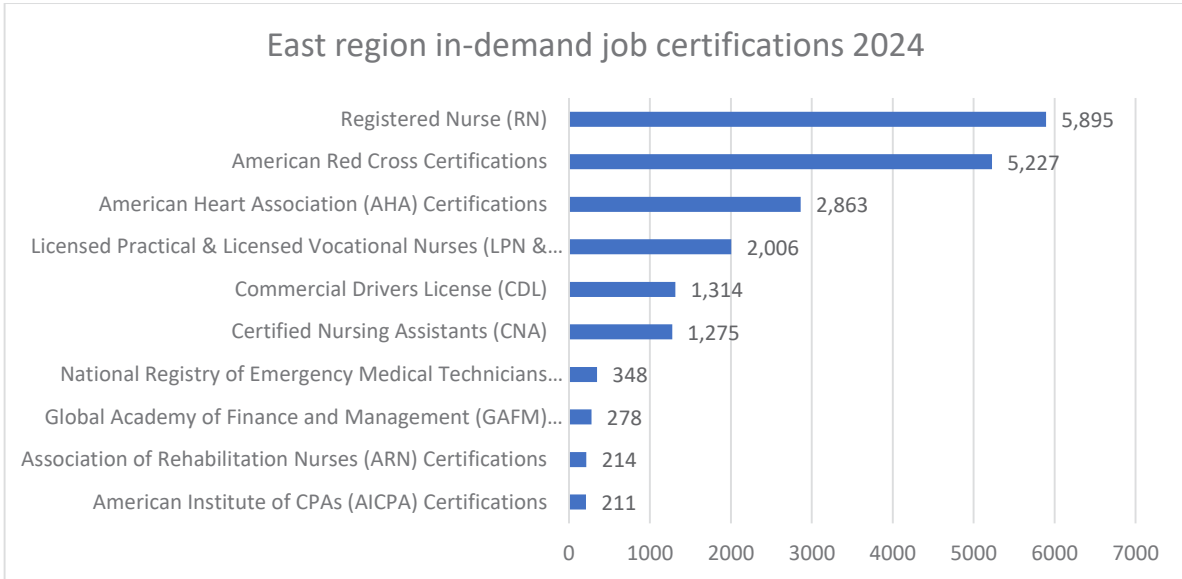
East TN Region- Occupational Group	May 2015 Jobs	May 2023 Jobs	Change in Jobs	% Change in Jobs	2023 Median Hourly Earnings
Architecture and Engineering	17,920	17,260	-660	-4%	38.11
Arts, Design, Entertainment, Sports, and Media	8,650	10,400	1,750	20%	19.94
Building and Grounds Cleaning and Maintenance	32,580	30,560	-2,020	-6%	14.80
Business and Financial Operations	29,970	49,010	19,040	64%	30.57
Community and Social Service	10,620	13,960	3,340	31%	22.34
Computer and Mathematical	14,770	18,300	3,530	24%	37.51
Construction and Extraction	33,010	42,470	9,460	29%	22.36
Educational Instruction and Library	52,210	51,680	-530	-1%	24.67
Farming, Fishing, and Forestry	1,020	1,310	290	28%	16.55
Food Preparation and Serving Related	96,160	107,850	11,690	12%	13.44
Healthcare Practitioners and Technical	67,360	68,750	1,390	2%	31.30
Healthcare Support	28,020	35,130	7,110	25%	16.43
Installation, Maintenance, and Repair	43,290	47,550	4,260	10%	22.90
Legal	4,020	4,780	760	19%	37.40
Life, Physical, and Social Science	6,270	7,480	1,210	19%	33.24
Management	54,140	63,460	9,320	17%	47.26
Office and Administrative Support	157,990	141,690	-16,300	-10%	18.56
Personal Care and Service	25,870	19,610	-6,260	-24%	13.79
Production	92,970	103,630	10,660	11%	19.48
Protective Service	20,850	20,300	-550	-3%	20.83
Sales and Related	98,510	92,510	-6,000	-6%	14.70
Transportation and Material Moving	84,650	105,460	20,810	25%	17.35

Source: TN Dept of Labor and Workforce, OEWS, May 2015 and May 2023

The TDLWD jobs4tn.gov web site tracks the top in-demand job certifications and tools and technologies from its advertised jobs database, updated every day. The table following shows the most requested certifications, including nursing, emergency medical technicians, commercial driver licenses, and financial certifications. In July 2024, the most requested technologies included facility with Microsoft and other computer programs, use of forklifts, operation of motor vehicles, and use of personal protective equipment.

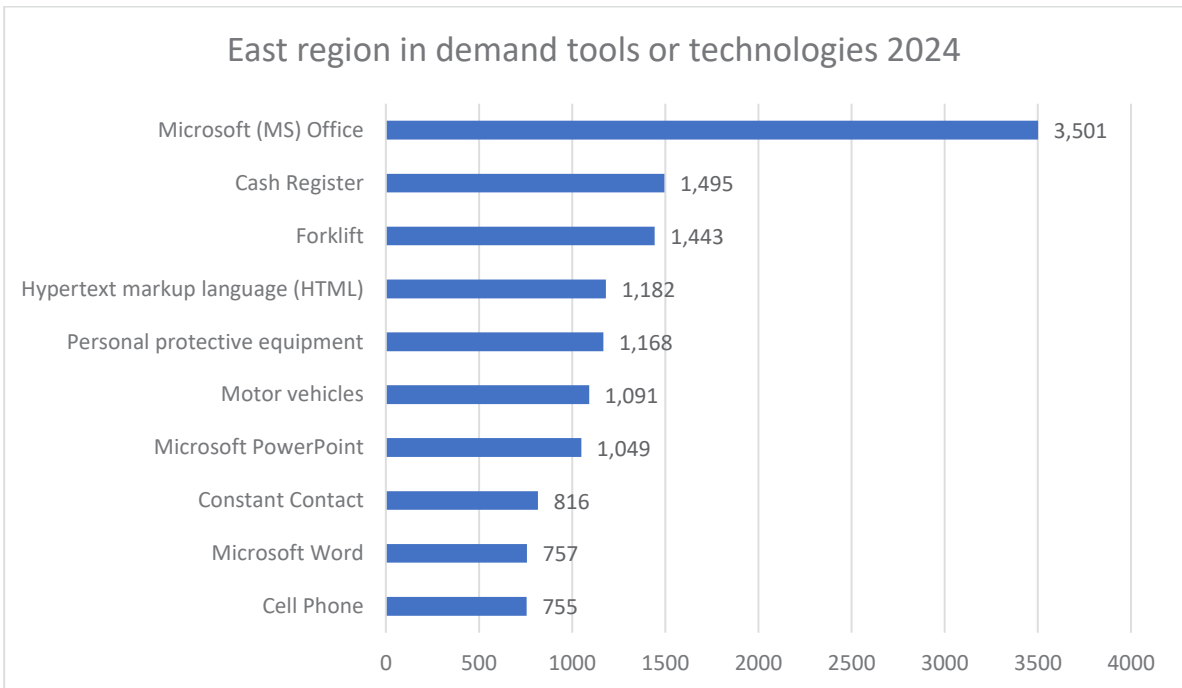
The top 10 employers posting jobs in the East Region in July 2024 included healthcare institutions, a local school system, and grocery stores. Top occupational postings included healthcare

practitioners and technical occupations, management, sales, and transportation and material moving occupations.



Source: jobs4tn.gov Online Advertised Jobs July 2024

Figure 30



Source: jobs4tn.gov Online Advertised Jobs July 2024

Figure 31

**Table 29: Top Employers Posting Jobs in the East Region**

Rank	Employer Name	Job Openings
1	Food City	1,499
2	Covenant Health	1,191
3	Ballad Health	1,004
4	Tacala, LLC	448
5	Knox County Schools	439
6	Oak Ridge National Laboratory	438
7	Community Health Systems, Inc.	356
8	Weigel's Farm Stores, Inc.	350
9	Erlanger Health System	338
10	Sonic Corp.	318

Source: Online Advertised Jobs data



Source: jobs4tn.gov Online Advertised Jobs, July 2024

Figure 32

## East Region Labor Force Summary

**Table 30: East Region Labor Force**

	Southeast LWDA	Northeast LWDA	East LWDA	East Region	State Total
Total Population 2022	679,446	525,455	1,292,014	2,496,915	7,051,339
Total Population 2023	688,327	531,841	1,310,556	2,530,724	7,126,489
Male Population 2022	338,938	261,002	645,499	1,245,439	3,459,277
Female Population 2022	340,508	264,453	646,515	1,251,476	3,667,212
Labor Force Participation Rate 2022 (5-Year Estimate)	57.4%	53.1%	59.8%	56.8%	58.6%
Labor Force Participation Rate 20223(5-Year Estimate)	57.2%	52.5%	58.2%	56.8%	59.5%
Annual Average Unemployment Rate 2022 Percent	3.6%	3.6%	3.3%	3.4%	3.4%
Annual Average Unemployment Rate 2023 Percent	3.5%	3.6%	3.2%	3.4%	3.3%
Educational Attainment 25 Years and Over (2022) Some College Or Higher - Percent	56.03%	50.01%	58.49%	55.95%	57.79%
Poverty Estimate, All Ages, Percent (2022)	11.46%	13.51%	11.47%	11.92%	14.00%
Percentage of Unemployed with a Disability (2022)	18.40%	19.62%	16.42%	18.15%	16.10%
Percent of Those Not in the Labor Force with a Disability (2022)	35.99%	38.56%	33.46%	35.29%	32.00%

Sources: TN Department of Labor and Workforce Development, WIRED Division, LAUS, and U.S. Census Bureau, ACS Five Year Estimates

**Table 31: Educational Attainment 2022**

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	1,537,571	94,629	55,547	3,704,326	726,292	204,442
High school graduate only	505,557	32,702	15,079	1,170,342	246,808	57,346
Percent high school graduate only	32.88%	34.56%	27.15%	31.59%	33.98%	28.05%
High school graduate or higher	1,371,149	82,637	35,983	3,345,355	639,823	135,989
Percent high school graduate or higher	89.18%	87.33%	64.78%	90.31%	88.09%	66.52%
Bachelor's degree or higher	417,099	17,977	9,663	1,144,871	162,237	38,648
Percent bachelor's degree or higher	27.13%	19.00%	17.40%	30.91%	22.34%	18.90%

Sources: U.S. Census Bureau, ACS five-year estimate 2022

The labor force participation rate (LFPR) in the East Region in 2023 was 56.80 percent, which is the same as in 2022. For the state of Tennessee, LFPR increased to 59.50 percent. The largest LWDA in the region, East LWDA, experienced a slight decline in LFPR. Unemployment rates remained unchanged from the previous year in the East region. The unemployment rate remained at 3.4 percent, while the state rate dropped to 3.3 percent.

**Table 32: East Region Disability Status of Those in the Labor Force 2022**

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
Southeast LWDA	399,784	302,167	287,552	21,031	266,521	14,615	2,400	12,215
Northeast LWDA	306,356	219,105	206,134	15,639	190,495	12,971	2,545	10,426
East LWDA	755,711	561,417	535,432	34,665	500,767	25,985	4,783	21,202
East Region	1,461,851	1,082,689	1,029,118	71,335	957,783	53,571	9,728	43,843
Tennessee	4,170,846	3,174,114	3,016,358	200,005	2,816,353	157,756	25,408	132,348

Sources: U.S. Census Bureau, ACS five-year estimate 2022

The Northeast LWDA reported the lowest rate of educational attainment in 2023, with 50.01 percent of the population aged 25 years or more having some college or additional education. This is a decrease from 2022 as well. Overall, the East region displays a lower level of educational achievement for adults with a bachelor's degree or higher aged 25 and above than the state. The East LWDA has the highest educational attainment in the region, having achieved a level of educational attainment higher than the state's. The percent of individuals who identify as either Black or Latino who achieved a bachelor's degree aged 25 and above increased to 19.00% and 17.40% respectively, lower than the state rates, however a slight increase from 2022 for both demographics.

The poverty rate saw a significant decrease in 2022 for the East Region. In 2021, the poverty rate for the region was over 15 percent. The highest poverty rate in the region was in the Northeast LWDA at over 13 percent. Reducing poverty and increasing educational attainment remain key targets of workforce policy in this LWDA. All the LWDAs in this region are reported to have poverty levels that are significantly lower than the state's. Notably, the Southeast poverty rate decreased from 18.82 percent to 11.46 percent in the Southeast while in 2022-2023 the Chattanooga MSA employment grew over 4 percent.

**Table 33: Disability Status of Those Not in the Labor Force, 2022**

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
Southeast LWDA	399,784	97,617	35,136	62,481	35.99%	64.01%
Northeast LWDA	306,356	87,251	33,650	53,601	38.57%	61.43%
East LWDA	755,711	194,294	65,021	129,273	33.47%	66.53%
East Region	1,461,851	379,162	133,807	245,355	35.29%	64.71%
Tennessee	4,170,846	996,732	319,284	677,448	32.03%	67.97%

Source: U.S. Census Bureau ACS Tables Five-Year Estimates

The East Region has a significantly higher percentage of those not in the labor force who have a disability. The rate of individuals not in the labor force with a disability for the region is 35.29, which is higher than the state's. The Northeast LWDA is reported to have the highest rate of these individuals, with 38.57 percent. In 2022 youth unemployment decreased from 10.60 in 2021 percent to 9.39 . As the area continues to recover from the effects of the Covid-19 pandemic, youth unemployment is an area that is expected to experience improvement.

**Table 34: Youth Unemployment 2022**

Area	Labor Force	Unemployment	Rate
Southeast LWDA	46,461	4,798	10.33%
Northeast LWDA	36,726	3,913	10.65%
East LWDA	92,527	7,792	8.42%
East Region	175,714	16,503	9.39%

Source: U.S. Census Bureau ACS Tables Five-Year Estimates

**Table 35: Significant Barriers to Employment- East Region**

	Northeast LWDA	East LWDA	Southeast LWDA	East Region	State Total
Number of American Indians or Alaskan Natives alone	976	2,360	1,095	4,431	14,118
Population Ages 15-19	31,868	79,376	41,623	152,867	443,411
Population Ages 20-24	34,047	86,903	39,462	160,412	460,990
Population Ages 55+	183,934	414,047	241,834	839,815	2,061,038
Number of Veterans 2023	37,737	81,847	39,879	159,463	414,746
Number Below Poverty	22,678	162,461	88,468	273,607	943,548
Number With Disability	101,058	208,357	113,322	422,737	1,043,327
Number of Single Parent Families	11,706	27,520	15,516	54,742	182,176
Probationers and Parolees 2024	5,233	11,074	4,293	20,600	62,544
Community Correction 2024	353	116	211	680	3,377
Mental Health Court Statistics 2024	6	15	18	59	278
Limited English Speaking	908	5,810	3,063	9,781	41,562
Foster Care Services - Youth Aged Out 2024	86	154	88	328	854
Clients In Recovery Courts 2024	124	398	115	637	1,502
Disadvantaged Youth and Adults 2023	61,910	127,625	69,660	259,195	693,590
TANF 24 Months from 2024	118	171	122	411	1,477
Prison Population 2024	1,392	1,933	1,942	5,267	19,056
Jail Population 2024	3,345	5,589	3,457	12,391	31,508

**Sources: Population:** U.S. Census Bureau, 2017-2022 American Community Survey, 5-year Estimates.

**Probationers and Parolees:** Lisa Helton and Adam Dawson, TN Dept of Correction

**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, 2022

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

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<https://www.tn.gov/content/dam/tn/correction/documents/BedJune2023.pdf>

## Apprenticeships

Since 2019 when the apprenticeship office was established in TDLWD, the number of apprenticeship completers has been steadily increasing; from 2020 (981) to 2023 (1,174). The variety of apprenticeships available is also greater; in 2023 there were apprenticeship completers in 86 different programs. The West Region has increased its percentage of completers to one in every five apprenticeships, adding 45 more completers over the year. The sponsors and the number of completers in each region and the LWDA's within each region are shown in Tables 36-38.

Table 39 lists the occupations for which the apprentices completed training. The top occupations in 2023 were electricians, pipe fitters (construction), chemical operators, sheet metal workers, and carpenters. There were nine occupations that had five or more completers that were not on the list in 2022. New programs with more than five completers included two in medical, two in computer science, and several in production and building maintenance occupations (indicated by a \* by the title) responding to personnel shortages in these areas.

**Table 36: East Region Apprenticeships**

Table 36 East Region Program Sponsor Name	LWDA	Program Sponsor County	Number of Completers
Consolidated Nuclear Security, LLC	East	Anderson County	7
Eagle Bend Manufacturing	East	Anderson County	2
Oak Ridge Electric JATC	East	Anderson County	55
Massey Construction, Inc.	East	Blount County	18
Tennessee Valley Youth Apprenticeships	East	Blount County	2
Walters State Community College	East	Hamblen County	33
Oshkosh Manufacturing LLC	East	Jefferson County	4
Electrician Training Academy Knoxville	East	Knox County	19
Funderburk Electrical Services	East	Knox County	8
Insulators Local 46 JATC	East	Knox County	10
Knoxville Area Sheet Metal Jac	East	Knox County	6
Knoxville Ironworkers Jac	East	Knox County	14
Knoxville Laborers JATC	East	Knox County	5
Knoxville Plumbers & Steamfitters JATC	East	Knox County	32
Knoxville Plumbing Heating Air Conditioning Cont	East	Knox County	6
North Knoxville Chrysler Dodge Jeep Ram	East	Knox County	1
Pellissippi State Community College	East	Knox County	2
Resource Valley	East	Knox County	20
Shoffnerkalthoff,Mes	East	Knox County	15
The University Of Tennessee Knoxville	East	Knox County	5
Dienamic Tooling System Inc	East	Roane County	4
<b>East Tennessee Total</b>			<b>268</b>
Parker Hannifin - Motion Systems Group - Pump & Motor Division	Northeast	Greene County	2
Holston Electric Co	Northeast	Hawkins County	3
Mountain Electric Cooperative	Northeast	Johnson County	2
Allen Brothers Construction	Northeast	Sullivan County	2
Eastman Chemical Co. - Coal Gas Division	Northeast	Sullivan County	4
Eastman Chemical Co. - Tn Operations	Northeast	Sullivan County	101
Northeast State Community College/Rcam	Northeast	Sullivan County	9
Primester	Northeast	Sullivan County	1
Tri-Cities Electrical JATC	Northeast	Sullivan County	2
Nuclear Fuel Services	Northeast	Unicoi County	1
Ao Smith	Northeast	Washington County	2
Plumber And Pipefitters, Local Union 538 JATC	Northeast	Washington County	6
<b>Northeast Total</b>			<b>135</b>

<b>Table 36 East Region Program Sponsor Name</b>	<b>LWDA</b>	<b>Program Sponsor County</b>	<b>Number of Completers</b>
Basf	Southeast	Hamilton County	2
Chattanooga Electrical JATC	Southeast	Hamilton County	79
Chattanooga Ironworkers Jac	Southeast	Hamilton County	5
Chattanooga State Community College	Southeast	Hamilton County	8
Chattanooga State Community College (Westrock)	Southeast	Hamilton County	1
Gestamp Chattanooga, LLC	Southeast	Hamilton County	1
Tennessee Carpenters Regional Council J.A.T.C.	Southeast	Hamilton County	67
Tennessee Millwrights Regional Council JATC Local 1554	Southeast	Hamilton County	3
Ua Local 43 Plumbers Steamfitters JATC	Southeast	Hamilton County	28
Operating Engineers Local No. 917 Apprenticeship & Training Fund	Southeast	McMinn County	3
<b>Southeast Total</b>			<b>197</b>
Grand Total for East Region			600

**Table 37: Middle Region Apprenticeships**

Table 37: Middle Region: Program Sponsor Name	LWDA	Program Sponsor County	Number of Completers
Abec Electric Company, LLC	Northern Middle	Davidson County	9
Asurion	Northern Middle	Davidson County	8
Dixon Management Group, LLC	Northern Middle	Davidson County	9
Elevator Constructors Local 93	Northern Middle	Davidson County	10
Fast Electrical Contractors, Inc.	Northern Middle	Davidson County	2
Harlan Electric	Northern Middle	Davidson County	2
Heat & Frost Insulators Local# 86 JATC	Northern Middle	Davidson County	3
John Bouchard & Sons Co.	Northern Middle	Davidson County	3
Nashville Electric Service	Northern Middle	Davidson County	10
Nashville Electrical JATC	Northern Middle	Davidson County	4
Nashville Ironworkers	Northern Middle	Davidson County	15
Nashville Plumbers And Pipefitters	Northern Middle	Davidson County	33
Nashville Sheetmetal JATC	Northern Middle	Davidson County	28
Nashville State Community College	Northern Middle	Davidson County	1
Next Steps At Vanderbilt University	Northern Middle	Davidson County	1
Specialty Care	Northern Middle	Davidson County	30
Stansell Electric Apprenticeship Training Program	Northern Middle	Davidson County	8
Summit Fire And Safety	Northern Middle	Davidson County	1
Tennessee College Of Applied Technology-Nashville	Northern Middle	Davidson County	15
Tennessee Department Of Education	Northern Middle	Davidson County	30
The Quiltss Institute	Northern Middle	Davidson County	3
Travis Electric Co	Northern Middle	Davidson County	3
City Light & Power, Inc.	Northern Middle	Montgomery County	2
Cumberland Electric Membership Corporation	Northern Middle	Montgomery County	2
Tennessee College Of Applied Technology Dickson	Northern Middle	Montgomery County	1
Fletchline Electrical Service, LLC	Northern Middle	Robertson County	1
Hatch Stamping Company	Northern Middle	Robertson County	1
M&M Electrical Contractor, Inc	Northern Middle	Robertson County	2
Cleopatra Electric Corp	Northern Middle	Rutherford County	1
IEC Middle Tennessee, Inc	Northern Middle	Rutherford County	2
Middle Tennessee Electric Membership Cooperative	Northern Middle	Rutherford County	6
NHC Healthcare Corporate	Northern Middle	Rutherford County	4
Tennessee Association Of Utility Districts	Northern Middle	Rutherford County	2
Tennessee College Of Applied Technology Murfreesboro	Northern Middle	Rutherford County	5
ITW Stamptech Fasteners	Northern Middle	Sumner County	1
North American Stamping Group	Northern Middle	Sumner County	11
Wil-Ro, Inc.	Northern Middle	Sumner County	1

<b>Table 37: Middle Region: Program Sponsor Name</b>	<b>LWDA</b>	<b>Program Sponsor County</b>	<b>Number of Completers</b>
Hamilton-Ryker Talentgro	Northern Middle	Williamson County	17
Lee Company	Northern Middle	Williamson County	1
Wasdgap,LLC Dba Honest 1 Auto Care Spring Hill	Northern Middle	Williamson County	2
<b>Northern Middle Total</b>			<b>290</b>
Micro Craft, Inc.	Southern Middle	Coffee County	1
Markus Insurance Agency, Inc	Southern Middle	Lawrence County	1
<b>Southern Middle Total</b>			<b>2</b>
TDS Disposal, LLC.	Upper Cumberland	Clay County	2
TLD Logistics	Upper Cumberland	Cumberland County	22
Smithville Electric System	Upper Cumberland	DeKalb County	1
Mountain Barn Builders, LLC	Upper Cumberland	Fentress County	2
Live Loxx, LLC	Upper Cumberland	Putnam County	3
My Father's Mustache	Upper Cumberland	Putnam County	9
<b>Upper Cumberland Total</b>			<b>39</b>
<b>Grand Total for Middle Region</b>			<b>331</b>

**Table 38: West Region Apprenticeships**

Program Sponsor Name	LWDA	Program Sponsor County	Number of Completers
Medegen Medical Products	Greater Memphis	Fayette County	2
Atlantic Track	Greater Memphis	Shelby County	6
Divine Electrical, Inc	Greater Memphis	Shelby County	4
Dobbs Technical Institute	Greater Memphis	Shelby County	1
Environmental Technical Services	Greater Memphis	Shelby County	1
G.I. Apprentice Inc	Greater Memphis	Shelby County	1
Greater Memphis Auto Dealers Association	Greater Memphis	Shelby County	18
International Union Of Elevator Constructors Local	Greater Memphis	Shelby County	9
IUOE Local 369 Training Fund	Greater Memphis	Shelby County	2
Memphis Electrical JATC	Greater Memphis	Shelby County	25
Memphis Ironworkers JAC	Greater Memphis	Shelby County	5
Memphis Light, Gas, And Water	Greater Memphis	Shelby County	22
Memphis Plumbers JAC	Greater Memphis	Shelby County	9
Memphis Sheet Metal Workers JAC	Greater Memphis	Shelby County	10
Mid South Independent Electrical Contractors	Greater Memphis	Shelby County	32
National Hardwood Lumber Association	Greater Memphis	Shelby County	1
Persevere	Greater Memphis	Shelby County	2
Progeny Place	Greater Memphis	Shelby County	2
Steamfitters Local Union 614 Joint Apprenticeship Training Program	Greater Memphis	Shelby County	21
West Tn Associated Builders & Contractors	Greater Memphis	Shelby County	5
Whitewater Protection	Greater Memphis	Shelby County	33
Wright Now LLC - Career & Technical School	Greater Memphis	Shelby County	4
<b>Greater Memphis Total</b>			<b>215</b>
Amteck	Northwest	Dyer County	4
Auston Mealers Equipment Services	Northwest	Dyer County	2
Dyersburg State Community College	Northwest	Dyer County	1
Tencom Services	Northwest	Dyer County	1
Alliance Staffing Group LLC	Northwest	Gibson County	1
<b>Northwest Total</b>			<b>9</b>
Rural Health Association Of Tennessee	Southwest	Decatur County	6
Hair Expressions	Southwest	Hardeman County	1
Southwest Tennessee EMC	Southwest	Haywood County	1
Tennessee College Of Applied Technology, Jackson	Southwest	Madison County	11
<b>Southwest Total</b>			<b>19</b>
<b>Grand Total for West Region</b>			<b>243</b>

**Table 39: State Apprenticeship Completers by Occupation**

Apprenticeship Occupation Title	Number of Completers 2023
Electrician (Alternate Title: Interior Electrician)	318
Pipe Fitter (Construction)	95
Chemical Operator III	57
Sheet Metal Worker	47
Carpenter	46
Plumber	43
Structural Steel Worker (Alternate Titles: Ironworker or Structural Ironworker)	39
Master Homeland Security Specialist	33
K-12 Teacher	30
Surgical Technologist	30
Millwright	29
Line Installer-Repairer	27
Truck Driver, Heavy	24
Electromechanical Technician	22
Automotive Technician Specialist	21
Elevator Constructor (Alternate Title: Elevator Constructor Mechanic)	19
Medical Assistant	18
Electrician	16
Nurse Assistant Certified (Existing Title: Nurse Assistant)	16
CNC Operator And Programmer	14
Tool And Die Maker	13
Composite Plastic Fabricator (Existing Title: Insulation Worker)	11
Hair Stylist (Existing Title: Cosmetologist)	10
Chemical Laboratory Technician	9
CNC Set-Up Programmer - Milling And Turning	9
Press Setup Operator - Stamping	8
Application Developer	7
Power-Plant Operator	7
Construction Craft Laborer	6
Electronic Systems Tech	6
Line Erector (Power-Line Distribution Erector)	6
Building Maintenance Repairer (Ex. Title: Maintenance Repairer, Building)	5
Heating & Air-Conditioner Install/Ser	5
Industrial Manufacturing Technician	5
Maint Mechanic (Any Ind) (Alternate Title: Industrial Maintenance Mechanic)	5
Mechatronics Technician	5
Nurse, Licensed Practical	5
Operating Engineer (Alternate Title: Heavy Construction Equipment Mechanic)	5
Project Manager	5

Apprenticeship Occupation Title	Number of Completers 2023
Welder, Combination	5
Administrative Assistant	4
Assembler, Metal Building	4
Heating & Air Conditioning Mechanic & Installer	4
Home Performance Laborer (Residential)	4
Maintenance Repairer, Industrial	4
Metal Fabricator	4
Refinery Operator	4
Home Health Aide	3
It Generalist	3
Machinist (Alternate Title: Precision Machinist)	3
Stamping Press Operator	3
User Experience Designer	3
Workforce Development Specialist	3
Cable Splicer	2
Commercial Transport Driver, Propane	2
Community Health Worker	2
Heating, Ventilation, Air Conditioning (Ex. Title: Heating & Air Conditioning Installer/Service)	2
Heavy And Tractor Trailer Truck Driver	2
Industrial Maintenance Mechanic	2
Line Maintainer (Alternate Title: High Voltage Electrician)	2
Machine Operator I	2
Manicurist	2
Pipe Coverer & Insulator	2
Pipeline Operations Technician	2
Refrigeration Mechanic (Any Ind)	2
Tree Trimmer (Line Clear)	2
Waste Treatment Operator	2
Automotive Mechanic (Existing Title: Automobile Mechanic)	1
Barber	1
Bricklayer (Construction)	1
Carpenter, Interior Systems (Alternate Title: Interior Systems Carpenter)	1
Cellar Worker (Wine)	1
Chef De Partie (Cook Hotel & Restaurant)	1
Die Manufacturer	1
Die Setter (Forging)	1
Early Childhood Educator	1
Electric Meter Repairer	1
Electrician, Substation	1
General Insurance Associate	1

Apprenticeship Occupation Title	Number of Completers 2023
Inspector, Building	1
Inspector, Outside Product	1
Stationary Engineer	1
Street-Light Servicer	1
Transformer Repairer	1
Wastewater-Treatmt - Plant Operator (Alternate Title: Water Treatment Specialist )	1
Water Systems Operation Specialist	1

## Conclusion

Tennessee's annual average industry growth in 2022-2023 was 1.8 percent, creating more than 57,000 jobs. Private service-providing jobs increased slightly faster (1.9 percent), bolstering overall growth, while goods-producing jobs (primarily manufacturing and construction) grew by 1.2 percent. Employment growth was not evenly distributed across the state; employment by place of work decreased by one percent in the West Region; grew by 3.3 percent in the Middle Region; and increased by 2.2 percent in the East Region. Employment in all the state's MSAs increased except in the Memphis MSA.

The top industries in the state are listed on page 2 of this report. Among the largest industries in the state in all three regions were health care and social assistance, manufacturing, educational services, and retail trade; the Middle and West regions also had large transportation, warehousing, and utilities industries, with the Middle and East having large accommodation and food service/leisure and hospitality sectors. The industries adding the most jobs in the state from 2018 to 2023 were transportation, warehousing, and utilities, adding 34,000 jobs and most prominent in the West and Middle Regions; professional, scientific, and technical industries, adding 33,000 jobs and more prominent in the Middle and East Regions; and information, adding 10,000 jobs, with more than half of jobs in the Middle Region. The West and Middle Regions also had large job gains in health care and social assistance and construction, and the East in manufacturing.

Spurring development in the advanced energy and advanced manufacturing industries is investment in electric vehicles, batteries, and parts, EV charging infrastructure, energy efficiency, renewable energy production, especially solar; and advanced nuclear sectors, with Tennessee being one of the top 10 states for investment in electric vehicles, electric batteries, and battery components. Although purchases of electric vehicles are increasing especially in the U.S., consumer demand is not at a level to sustain profit margins expected by auto producers so product redesign is underway in the industry. The growth of artificial intelligence and the construction of data centers is another factor which requires further electrification in the state. A new innovative solution for data centers is to tap into geothermal energy, another renewable source.

Occupational shortages in the new manufacturing technology, health care and social assistance, construction, and digital technology and communications workforces are requiring new approaches to workforce development that are creating partnerships for recruitment, hiring, skill and credential development and social supports that can bring individuals with barriers to employment into the workforce and help sustain them there.

The Solar Census 2023 report by the Interstate Renewal Energy Council (IREC) found that Tennessee had 5,199 solar jobs in 2023, with 852 added over the year (a growth rate of nearly 20 percent) and projected 7.4 percent growth rate in 2024.<sup>35</sup> In a national survey of solar employers,

29 percent said it was very difficult to hire solar workers, especially electricians and engineers and those with skills and knowledge relating to battery storage.<sup>36</sup> Registered apprenticeships and a variety of on-the-job training programs can help reduce these shortages. Solar companies have been successful in hiring young workers and veterans; they have found partnerships with high schools and vocational schools in their communities are strategies that are increasing employment of women and people of color.

## Improving Labor Force Participation Rates

New strategies are needed to improve labor force participation rates in Tennessee, which have continually lagged the national rate; the governor's goal is 63 percent. Significant improvements were made in the Southwest and Greater Memphis LWDAs over the year. In the Middle Region, the only LWDA with a labor force participation rate higher than the state was the Northern Middle, at 67 percent. The LFPRs in the East Region remain about three percentage points below the state rate.

LFPR increases will require continuous job growth in urban and rural areas, and filling in-demand jobs to provide employers with the skilled workforce they need. For the nation, the labor force participation rate of prime age working women, especially mothers with young children, was the highest ever in 2023 but started to roll back in 2024, partly due to lack of day care resources and their high cost. In response, the Biden-Harris administration awarded \$8 million through the Appalachian Regional Commission (ARC) to the Save the Children Federation to enlarge the childcare and early education workforce in Tennessee, Kentucky, and West Virginia.<sup>37</sup> Methods will include training, apprenticeships, credentialing, and technical assistance. Strategies in the state to support prime age working women to continue their high LFPRs are needed.

The state needs to step up its strategies to increase the educational attainment of low-income people, especially women and minorities. Other successful strategies include expanding health insurance to low-income families. Improving workers' health, keeping them on the job, and integrating individuals with health limitations into the job market through vocational rehabilitation and other services has reduced declining LFPRs in some counties. Younger workers and those with less job experience may need a variety of social supports such as mentorship, basic income, transportation, and educational remediation. The goal is to build a workforce system that allows labor force participants to gain the skills, abilities and supports to obtain and retain jobs that provide living wages and allow them to gain resilience and sustain their families.

### Endnotes

<sup>35</sup>Interstate Renewable Energy Council (IREC). <https://irecusa.org/Tennessee-solar-and-clean-energy-jobs>

<sup>36</sup><https://irecusa.org/programs/solar-jobs-census.org>

<sup>37</sup><https://www.arc.gov/wp-content/uploads/2024/08/2024.09-arise-project-snapshot-save-the-children-federation-inc.pdf>

# Appendix

## Regions, LWDAs, and County Alignments

Region	LWDA Title	County Name
EAST	East Tennessee	Anderson County
EAST	East Tennessee	Blount County
EAST	East Tennessee	Campbell County
EAST	East Tennessee	Claiborne County
EAST	East Tennessee	Cocke County
EAST	East Tennessee	Grainger County
EAST	East Tennessee	Hamblen County
EAST	East Tennessee	Jefferson County
EAST	East Tennessee	Knox County
EAST	East Tennessee	Loudon County
EAST	East Tennessee	Monroe County
EAST	East Tennessee	Morgan County
EAST	East Tennessee	Roane County
EAST	East Tennessee	Scott County
EAST	East Tennessee	Sevier County
EAST	East Tennessee	Union County
EAST	Northeast TN	Carter County
EAST	Northeast TN	Greene County
EAST	Northeast TN	Hancock County
EAST	Northeast TN	Hawkins County
EAST	Northeast TN	Johnson County
EAST	Northeast TN	Sullivan County
EAST	Northeast TN	Unicoi County
EAST	Northeast TN	Washington County
EAST	Southeast TN	Bledsoe County
EAST	Southeast TN	Bradley County
EAST	Southeast TN	Grundy County
EAST	Southeast TN	Hamilton County
EAST	Southeast TN	Marion County

Region	LWDA Title	County Name
EAST	Southeast TN	McMinn County
EAST	Southeast TN	Meigs County
EAST	Southeast TN	Polk County
EAST	Southeast TN	Rhea County
EAST	Southeast TN	Sequatchie County
MIDDLE	Northern Mid. TN	Cheatham County
MIDDLE	Northern Mid. TN	Davidson County
MIDDLE	Northern Mid. TN	Dickson County
MIDDLE	Northern Mid. TN	Houston County
MIDDLE	Northern Mid. TN	Humphreys County
MIDDLE	Northern Mid. TN	Montgomery County
MIDDLE	Northern Mid. TN	Robertson County
MIDDLE	Northern Mid. TN	Rutherford County
MIDDLE	Northern Mid. TN	Stewart County
MIDDLE	Northern Mid. TN	Sumner County
MIDDLE	Northern Mid. TN	Trousdale County
MIDDLE	Northern Mid. TN	Williamson County
MIDDLE	Northern Mid. TN	Wilson County
MIDDLE	Southern Mid. TN	Bedford County
MIDDLE	Southern Mid. TN	Coffee County
MIDDLE	Southern Mid. TN	Franklin County
MIDDLE	Southern Mid. TN	Giles County
MIDDLE	Southern Mid. TN	Hickman County
MIDDLE	Southern Mid. TN	Lawrence County
MIDDLE	Southern Mid. TN	Lewis County
MIDDLE	Southern Mid. TN	Lincoln County
MIDDLE	Southern Mid. TN	Marshall County
MIDDLE	Southern Mid. TN	Maury County
MIDDLE	Southern Mid. TN	Moore County
MIDDLE	Southern Mid. TN	Perry County
MIDDLE	Southern Mid. TN	Wayne County
MIDDLE	Upper Cumberland	Cannon County
MIDDLE	Upper Cumberland	Clay County
MIDDLE	Upper Cumberland	Cumberland County
MIDDLE	Upper Cumberland	DeKalb County
MIDDLE	Upper Cumberland	Fentress County
MIDDLE	Upper Cumberland	Jackson County
MIDDLE	Upper Cumberland	Macon County
MIDDLE	Upper Cumberland	Overton County
MIDDLE	Upper Cumberland	Pickett County
MIDDLE	Upper Cumberland	Putnam County
MIDDLE	Upper Cumberland	Smith County
MIDDLE	Upper Cumberland	Van Buren County

Region	LWDA Title	County Name
MIDDLE	Upper Cumberland	Warren County
MIDDLE	Upper Cumberland	White County
WEST	Greater Memphis	Fayette County
WEST	Greater Memphis	Lauderdale County
WEST	Greater Memphis	Shelby County
WEST	Greater Memphis	Tipton County
WEST	Northwest TN	Benton County
WEST	Northwest TN	Carroll County
WEST	Northwest TN	Crockett County
WEST	Northwest TN	Dyer County
WEST	Northwest TN	Gibson County
WEST	Northwest TN	Henry County
WEST	Northwest TN	Lake County
WEST	Northwest TN	Obion County
WEST	Northwest TN	Weakley County
WEST	Southwest TN	Chester County
WEST	Southwest TN	Decatur County
WEST	Southwest TN	Hardeman County
WEST	Southwest TN	Hardin County
WEST	Southwest TN	Haywood County
WEST	Southwest TN	Henderson County
WEST	Southwest TN	Madison County
WEST	Southwest TN	McNairy County

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