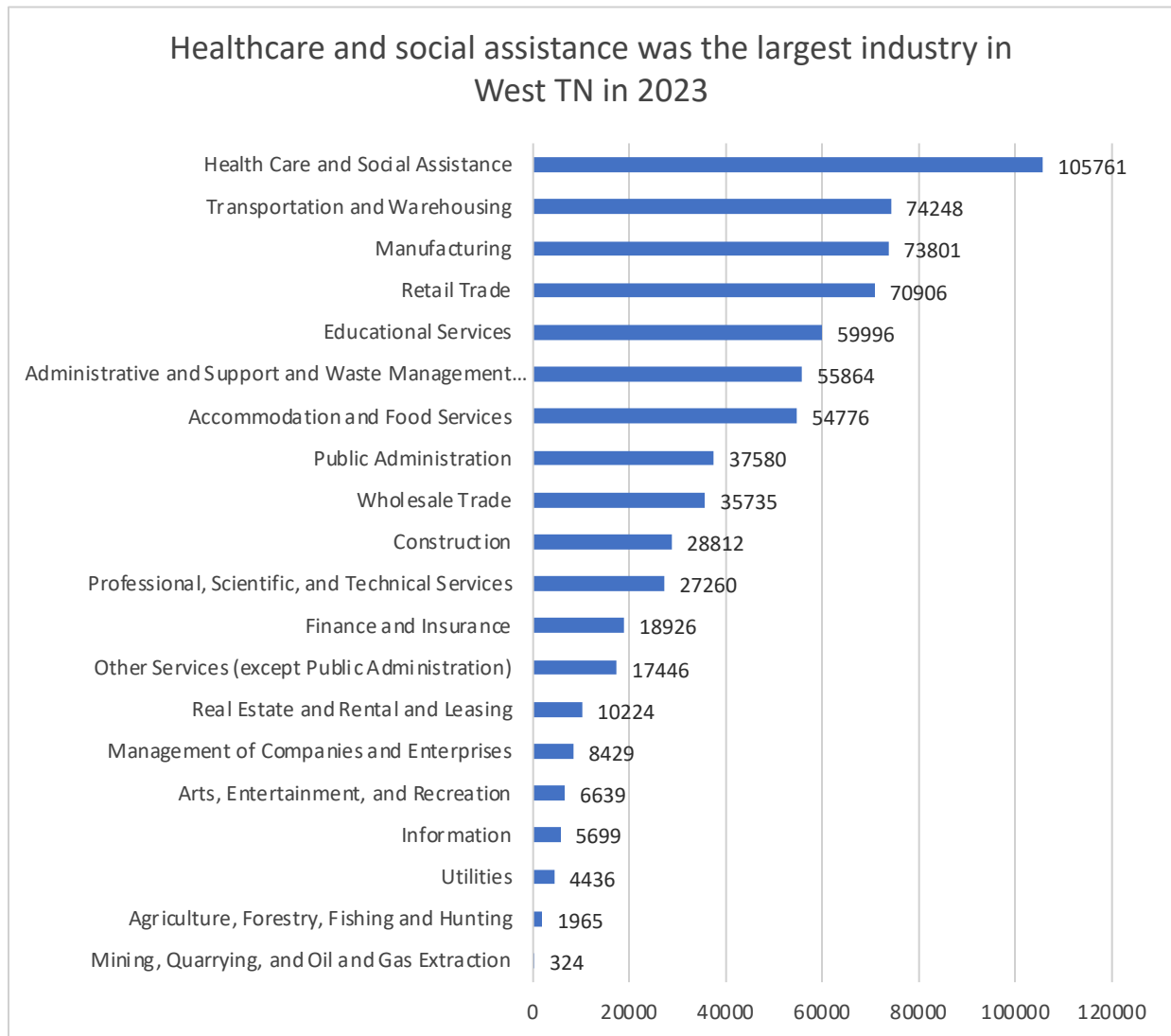


West Region Overview



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.

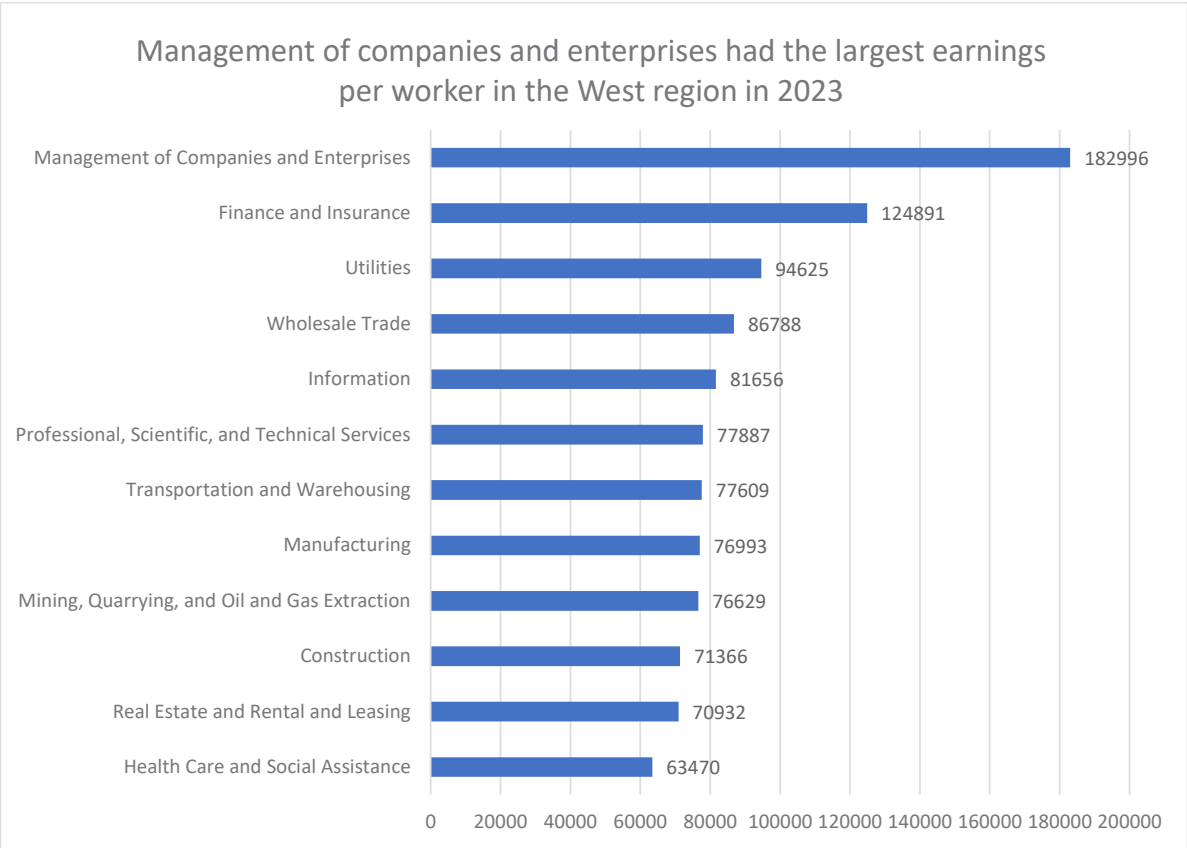
West TN Industry Employment and Earnings (2018-2023)

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.

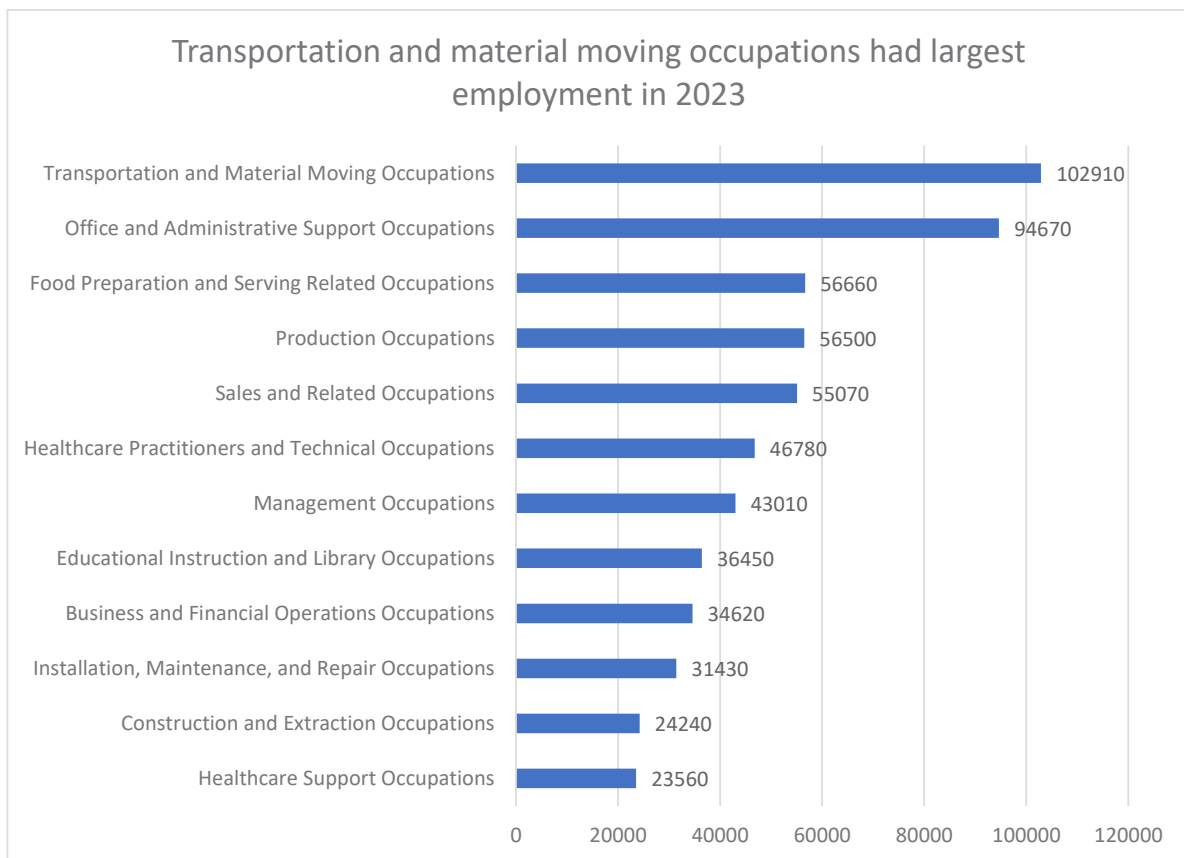
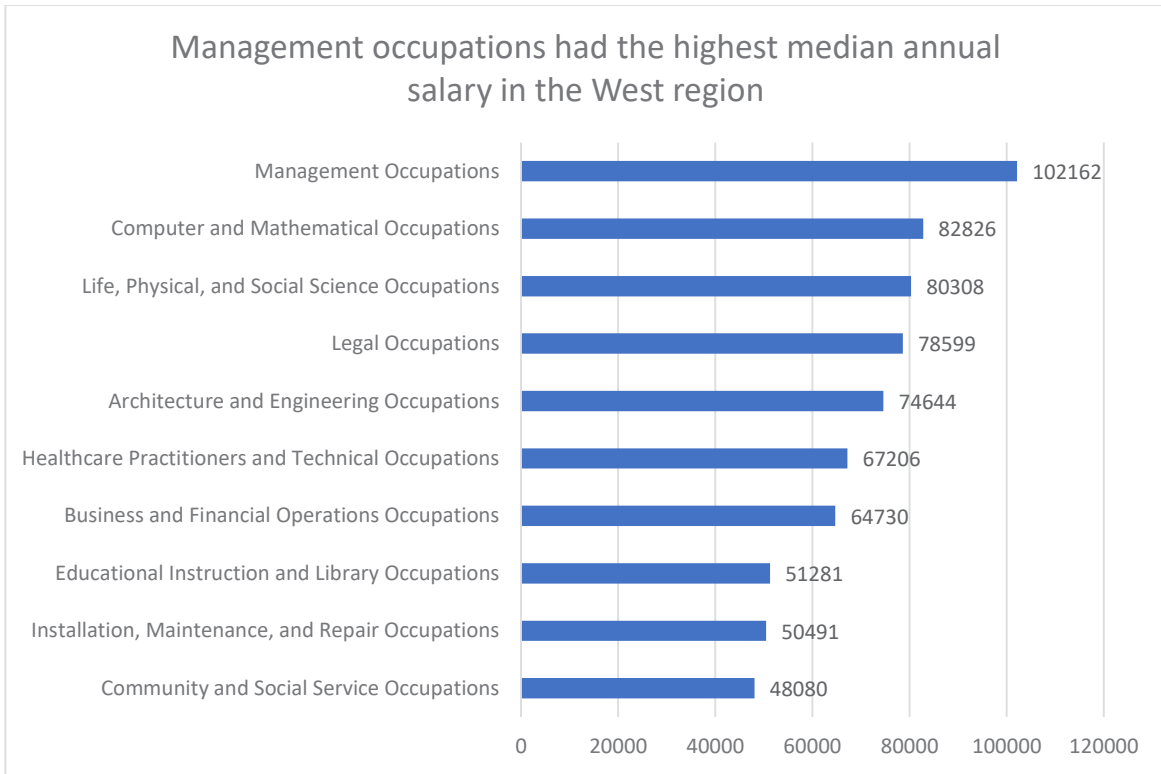


Figure 14

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

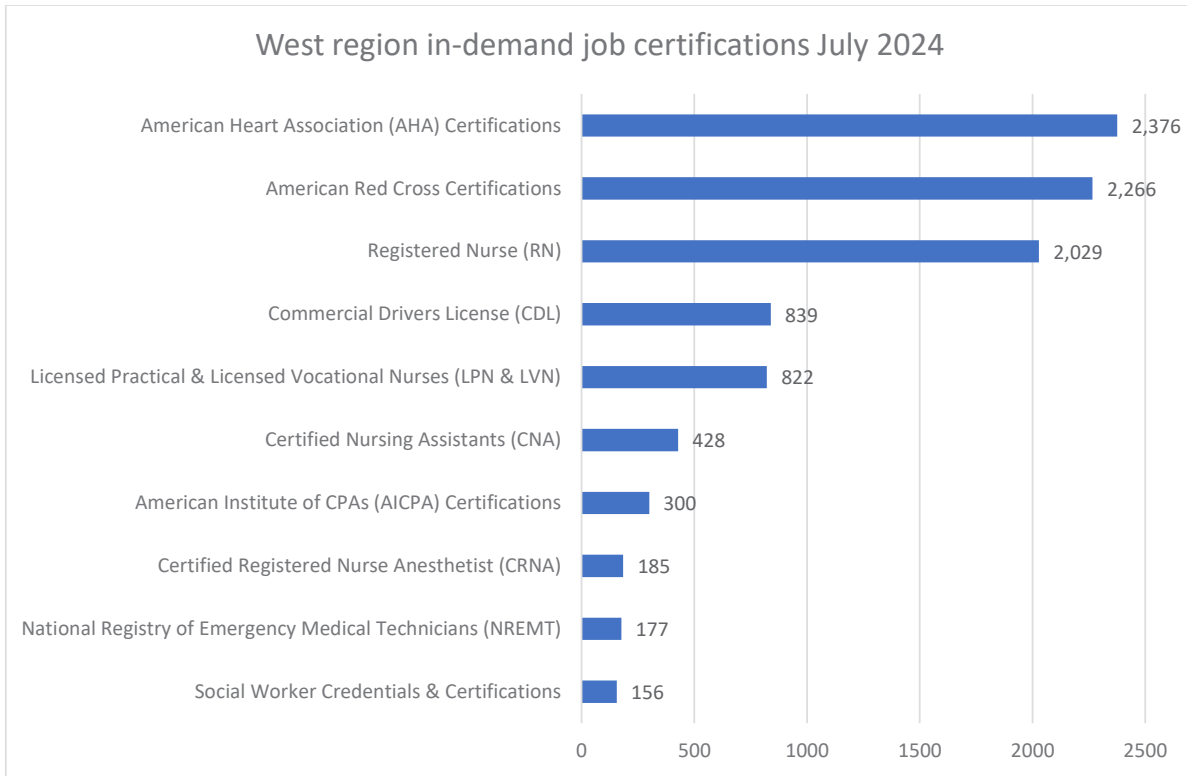
Figure 15

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

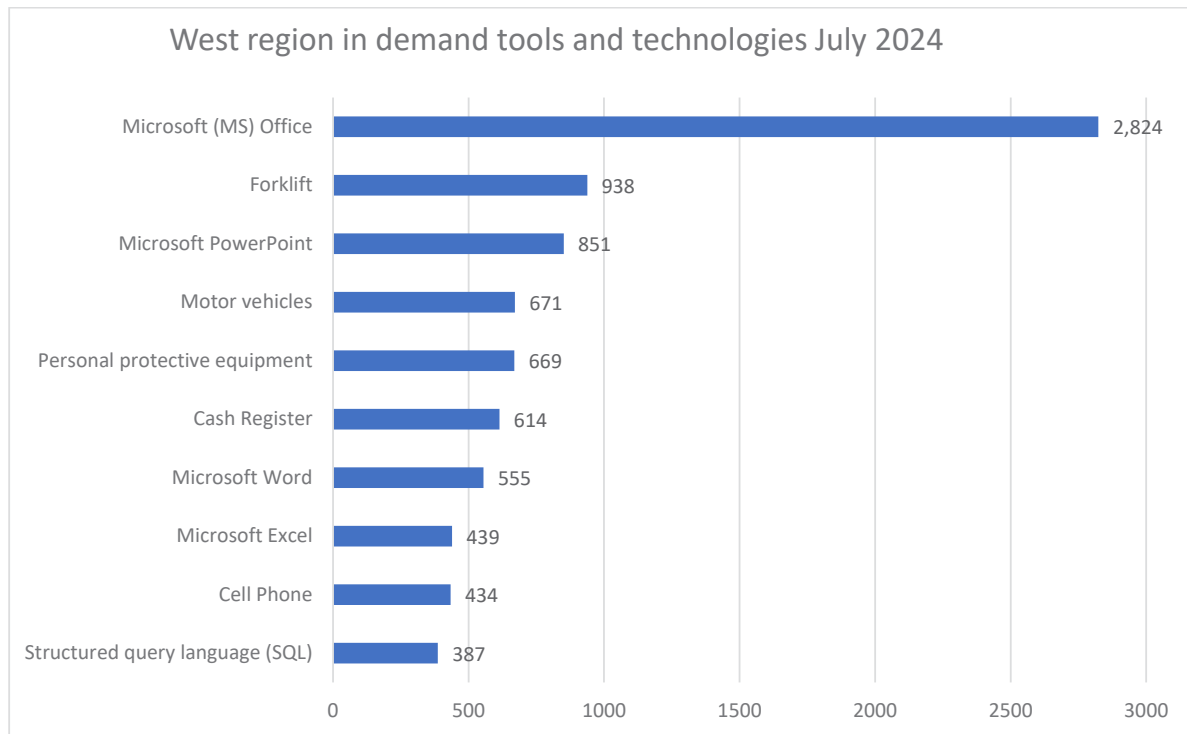
West TN Region Occupational Group	May 2015 Jobs	May 2023 Jobs	Change in Jobs	% Change in Jobs	2023 Median Hourly Earnings
Architecture and Engineering Occupations	8,610	8,520	-90	-1%	35.89
Arts, Design, Entertainment, Sports, and Media Occupations	5,810	6,120	310	5%	20.93
Building and Grounds Cleaning 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

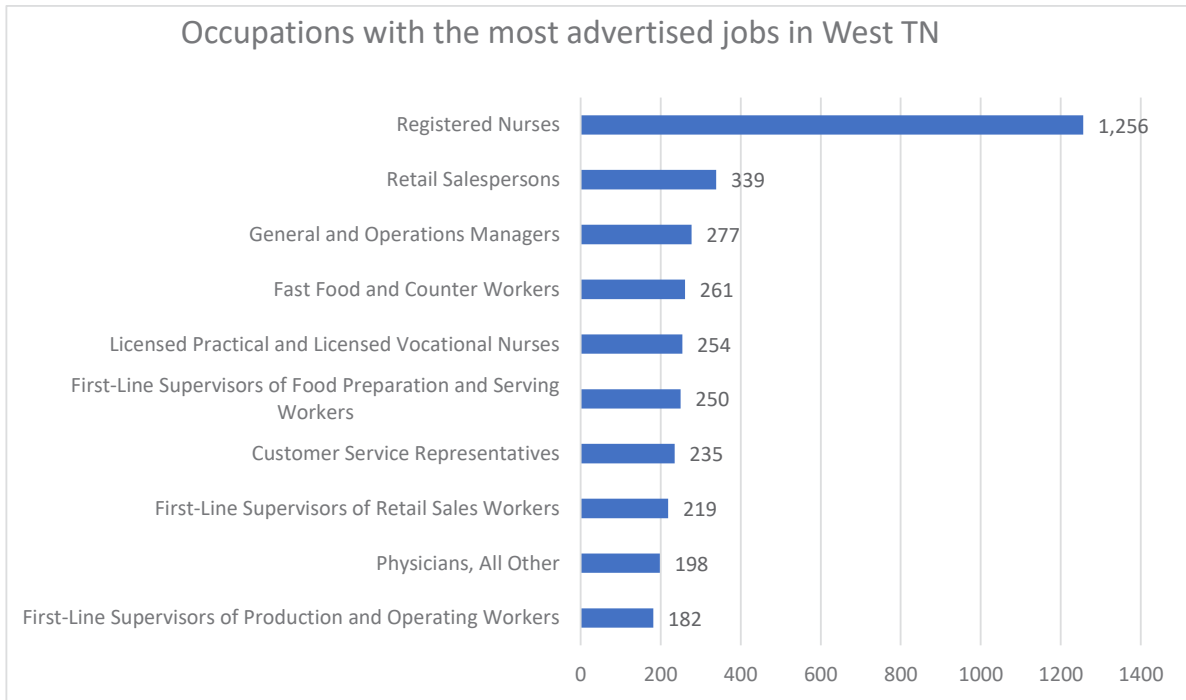


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Figure 17

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>