




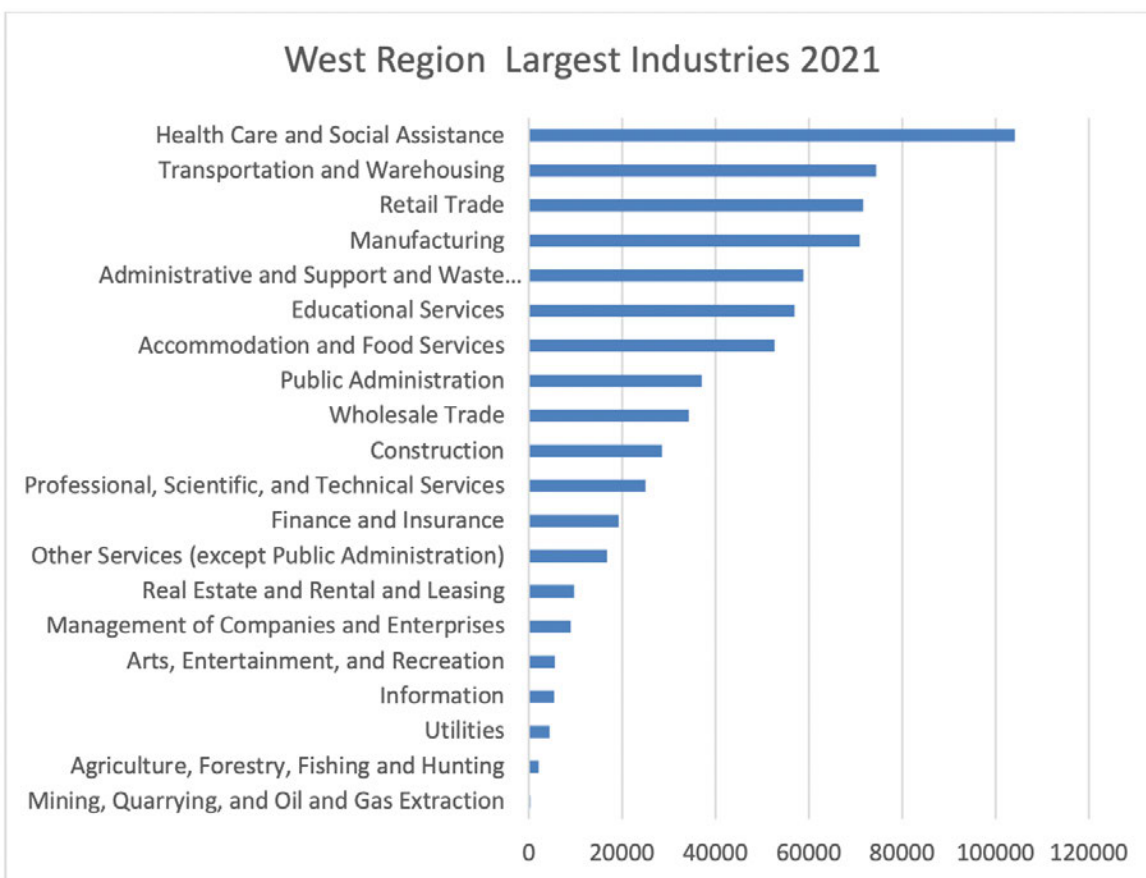


Tennessee West Region's Economy | 2021

 Employment	Total Employment 2021: 676,654 2.8% 2020: 657,970 Stronger	New Jobs 2021: 18,684 2020: -38,818 Stronger	MSA Employment 2020-2021 Jackson: 3.00% Memphis: 3.00% Stronger
 Employers	Total Number of Establishments 2021: 38,091 4.9% 2020: 36,309 Stronger	Total Wages 2021: \$41.3 Billion 8.7% 2020: \$38.0 Billion Stronger	Counties Increased Employment 2021: 14 2020: 2 Stronger
 Wages & Income	Average Annual Wage 2021: \$44,322 5.6% 2020: \$41,986 Stronger	West Median Wage 2021: \$36,969 -0.4% 2020: \$37,128 Challenge	Counties Increased Annual Wages 2021: 21 2020: 18 Stronger
 Labor Force & Demographics	Unemployment Rate 2021: 4.8% -2.6% 2020: 7.4% Stronger	Labor Force 2021: 719,420 -0.04% 2020: 719,729 Challenge	Unemployment Rates Youth 2020: 15.8% % In Poverty, 2020: 18.3% Stronger
 Job Outlook	Ratio of Unemployed to Job Openings June 2021: 1.42 -49.82% June 2020: 2.83 Stronger	Projected Annual Growth Rate, All Occupations 2018-2028: 0.55% Stronger	Projected Annual Avg. Job Openings 2018-2028: 94,946 Stronger

West Region Overview



Source: TN Department of Labor and Workforce Development, WIR²ED Division, Quarterly Census of Employment and Wages (QCEW).

Figure 12

West Region's Economy, 2020-2021

Total employment in the West Region, excluding agriculture and the self-employed, increased from 657,970 to 676,654, an increase of 2.8 percent or 18,680 jobs (see West Region Summary page 28). This rate of job growth was slower than the state. It was led by the faster job growth in the metro areas of Jackson and Memphis, which both grew by three percent over the year in a complete reversal of last year's declines.

The West Region consists of three Local Workforce Development Areas: Greater Memphis, Southwest, and Northwest, encompassing a total of 21 counties (see list p.). Of these, 14 counties increased in employment from 2020 to 2021, compared to only two the previous year. The average number of establishments increased to 36049 over the year. Payroll increased by 8.7 percent to \$41.3 billion. The increase in payroll was at a slower rate than the state but still accounts for nearly 1 in every four payroll dollars in the state.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers. The median occupational wage decreased by 0.4 percent to \$36,969, just below the state median.

Regarding the labor force, the average unemployment rate decreased from 2020 to 2021 to 4.8 percent, just 0.5 percentage points below the state average. The labor force decreased over the year by a nominal 309 persons, basically remaining stable. Youth unemployment in 2020 (the latest available) increased to 15.8 percent, compared to the state rate of 11.4 percent for 2020. The percent of those in poverty who were unemployed decreased to 15.8 percent, while above the state rate of 11.4 percent. In 2021 the number of unemployed compared to the number of job listings on the state job bank, jobs4tn.gov, was 1.42 percent, decreasing from the higher rate in 2020 but still indicating more unemployed individuals than jobs in the region.

To summarize: In 2021 compared to 2020, the West Region saw positive growth in employment, with metropolitan areas leading the growth. Payroll increased, somewhat slower than the rest of the state. The median wage was stable but not increasing. In 2020, unemployment rates overall and for youth and those in poverty remained higher than state rates. The Blue Oval project, Ford's and SK's electric vehicle and battery manufacturing plant, should assist in raising employment and skill levels in the area.

West TN Industries and Occupations (2018-2021)

Total employment in the West Region in 2021, excluding self employed and agricultural workers, was 687,433.

The five largest industry sectors in 2021 were

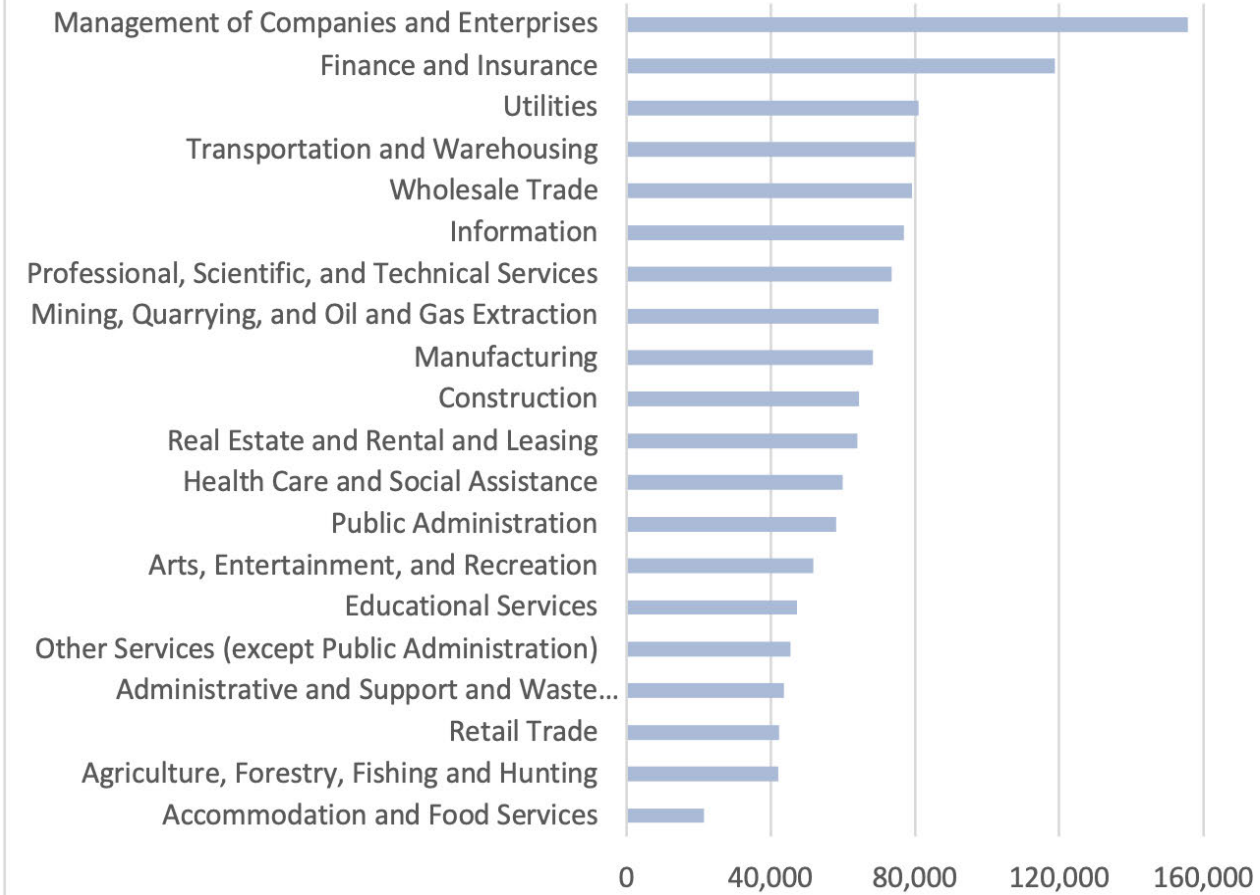
- Health care and social assistance (104,168 jobs)
- Transportation and warehousing (74,496)
- Retail trade (71,703)
- Manufacturing (70,864)
- Administrative and support and waste management and remediation (58,800)

Compared to 2018, the industries adding the most new workers include transportation and warehousing (almost 7,000 new jobs), health care and social assistance (6,600 new jobs), and construction (nearly 1,400 new jobs). However, some of the largest industries lost jobs from 2018 to 2021, including retail trade (4,951), administrative and support (2,976), and manufacturing (687). Employment in accommodation and food services was still 13 percent below its employment level in 2018. However, other than arts, entertainment, and recreation, all industry sectors increased in earnings per worker (total LWDA payroll divided by the

average number of workers). The largest increases were in the information and retail trade sectors, followed by real estate and administrative and support. The industries with the highest earnings per worker were the management of companies and enterprises, finance and insurance, utilities, and transportation and warehousing, with accommodation and warehousing having the lowest earnings per employee.

West Tennessee Local Workforce Development Areas and Counties	
<u>Southwest Tennessee</u>	
Chester	Haywood
Decatur	Henderson
Hardeman	Madison
Hardin	McNairy
<u>Northwest Tennessee</u>	
Benton	Henry
Carroll	Lake
Crockett	Obion
Dyer	Weakley
Gibson	
<u>Greater Memphis Tennessee</u>	
Fayette	Shelby
Lauderdale	Tipton

West Region Top Industry Earnings 2021



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

Figure 13

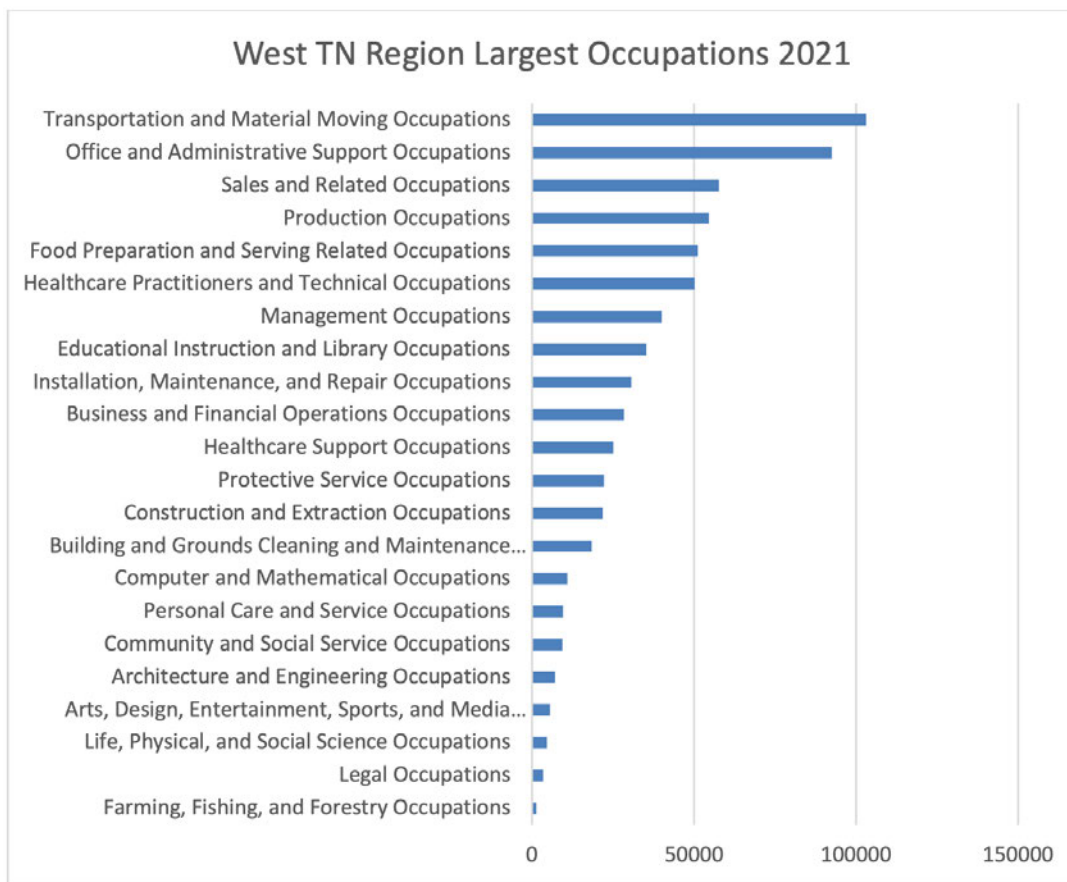
**Table 9: Transportation and Warehousing and Health Care and Social Assistance
Added the Most Jobs in 2018-2021**

West Region Industries	2018 Jobs	2021 Jobs	Change in Jobs	% Change in Jobs	2018 Earnings Per Worker	2021 Earnings Per Worker	% Change in earnings per worker
Transportation and Warehousing	67,509	74,496	6,987	10%	67,286.96	80,146.22	19%
Health Care and Social Assistance	97,558	104,168	6,610	7%	53,583.39	60,070.28	12%
Construction	27,277	28,632	1,355	5%	57,548.23	64,572.29	12%
Professional, Scientific, and Technical Services	24,774	24,986	212	1%	60,871.18	73,464.44	21%
Educational Services	56,798	56,949	151	0%	43,298.95	47,360.31	9%
Utilities	4,420	4,417	-3	0%	71,422.22	80,891.11	13%
Public Administration	37,224	37,038	-186	0%	52,340.39	58,126.26	11%
Manufacturing	71,511	70,864	-647	-1%	62,249.46	68,223.39	10%
Mining, Quarrying, and Oil and Gas Extraction	321	316	-5	-2%	61,102.81	69,926.05	14%
Wholesale Trade	34,949	34,289	-660	-2%	68,665.25	79,299.74	15%
Management of Companies and Enterprises	9,430	8,999	-431	-5%	139,606.44	155,688.19	12%
Administrative and Support and Waste Management and Remediation Services	61,776	58,800	-2,976	-5%	35,811.29	43,763.44	22%
Real Estate and Rental and Leasing	10,291	9,772	-519	-5%	52,444.70	64,106.23	22%
Retail Trade	76,654	71,703	-4,951	-6%	33,282.05	42,418.92	27%
Finance and Insurance	20,828	19,269	-1,559	-7%	105,896.78	118,876.19	12%
Other Services (except Public Administration)	18,203	16,755	-1,448	-8%	37,201.99	45,383.70	22%
Information	5,983	5,468	-515	-9%	60,551.80	76,825.15	27%
Agriculture, Forestry, Fishing and Hunting	2,311	2,067	-244	-11%	35,664.97	42,094.11	18%
Accommodation and Food Services	60,291	52,710	-7,581	-13%	18,648.32	21,558.48	16%
Arts, Entertainment, and Recreation	6,554	5,647	-907	-14%	52,348.68	51,711.56	-1%

Source: TN Dept of Labor and Workforce, QCEW Annual Averages, 2018 and 2021

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 2021, which provides data on all industries except agriculture and the self-employed. Employment in this group in May 2021 was 103,160, adding more than 11,000 jobs since May 2015. Office and administrative support, sales, and production were next in total numbers of jobs.



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

Figure 14

Other occupational groups which added the most new jobs from 2015 to 2021 included healthcare support, business and finance, healthcare practitioners and technical, management, and community and social service. Office and administrative support and personal care and service lost the most jobs over the six year period. Other than management, the occupational groups with the highest median earnings included computer and mathematical; business and finance; life, physical and social science; healthcare practitioners and legal; and architecture and engineering. These earnings results show the importance of STEM education and training in achieving higher earnings.



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

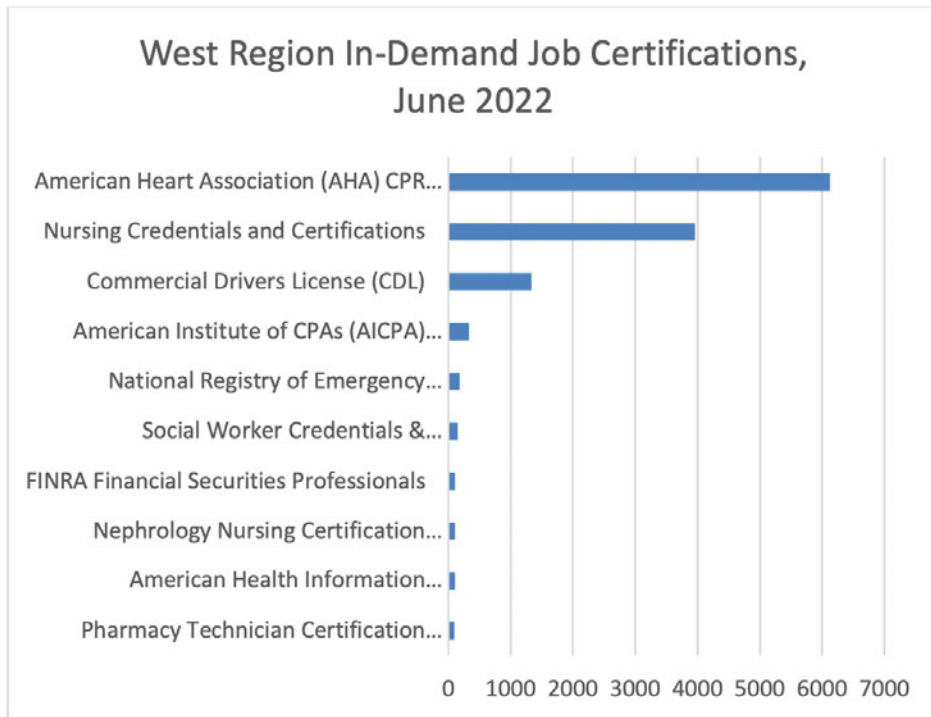
Figure 15

The TDLWD jobs4tn.gov web site tracks the top in-demand job certifications and tools and technologies from its advertised jobs database, updated every day. The table below shows the most requested certifications, including CPR, nursing credentials, and commercial driver license certifications. For June 2022, most requested technologies 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 West Region on September 1, 2022, 6 included hospitals and other healthcare institutions, along with Fed Ex and fast food companies. Reflecting the top occupational groups and those adding the most new jobs, top job postings in the region included healthcare practitioners and technical occupations, management, transportation and material moving, sales, office, and food preparation, and computer and mathematical jobs.

**Table 10: Healthcare Support, Business and Finance, Community and Social Service
Add the Largest Percent of New Jobs 2015-2021**

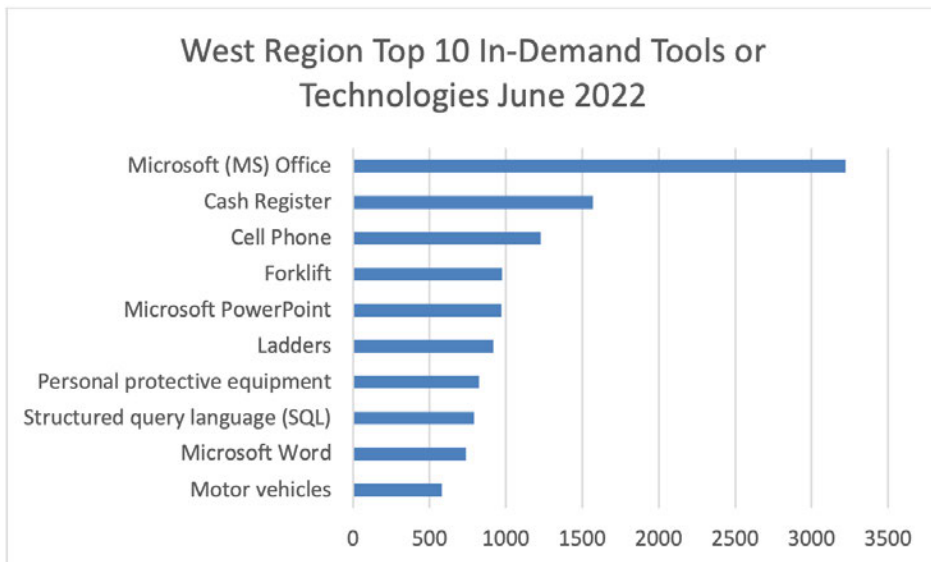
West TN Region Occupational Group	May 2015 Jobs	May 2021 Jobs	Change in Jobs	% Change in Jobs	2021 Median Hourly Earnings
Total, All Occupations	691,600	682,800	-8,800	-1%	18.09
Healthcare Support	18,330	25,000	6,670	36%	13.89
Business and Financial Operations	22,270	28,350	6,080	27%	29.28
Community and Social Service	7,600	9,460	1,860	24%	22.09
Life, Physical, and Social Science	3,890	4,560	670	17%	29.46
Farming, Fishing, and Forestry	1,160	1,350	190	16%	14.33
Arts, Design, Entertainment, Sports, and Media	4,720	5,490	770	16%	18.38
Computer and Mathematical	9,540	10,870	1,330	14%	30.78
Transportation and Material Moving	91,600	103,160	11,560	13%	17.47
Healthcare Practitioners and Technical	46,000	50,110	4,110	9%	29.22
Management	37,900	39,970	2,070	5%	46.75
Legal	3,280	3,440	160	5%	29.98
Protective Service	21,690	22,210	520	2%	18.10
Installation, Maintenance, and Repair	30,510	30,680	170	1%	22.73
Building and Grounds Cleaning and Maintenance	18,400	18,460	60	0%	13.68
Construction and Extraction	22,040	21,840	-200	-1%	19.18
Production	56,790	54,510	-2,280	-4%	17.85
Food Preparation and Serving Related	54,120	51,230	-2,890	-5%	10.64
Educational Instruction and Library	38,540	35,240	-3,300	-9%	23.50
Sales and Related	66,650	57,570	-9,080	-14%	13.98
Office and Administrative Support	110,070	92,490	-17,580	-16%	17.84
Architecture and Engineering	8,890	7,150	-1,740	-20%	36.70
Personal Care and Service	17,610	9,650	-7,960	-45%	11.80

Source: TN Dept of Labor and Workforce, OEWS, May 2015 and May 2021



Source: Jobs4tn.gov Online Advertised jobs, June 2022

Figure 16



Source: Jobs4tn.gov Online Advertised Jobs, June 2022

Figure 17

Table 11: Top Employers Posting Jobs - West Region

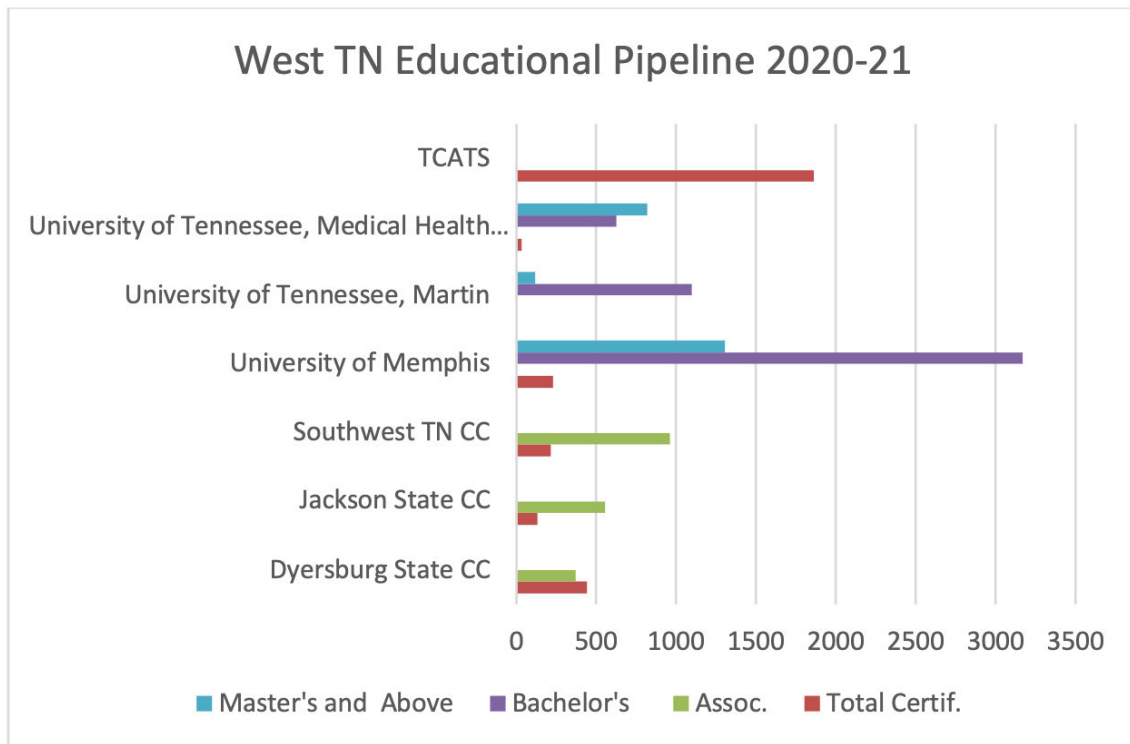
West Region- Top Employers Posting Jobs September 1, 2022	Job Openings
Methodist Le Bonheur Healthcare	1,276
St. Jude Children's Research Hospital Inc.	1,018
Baptist Memorial Health Care Corporation	988
Carrols Corporation (Burger King, Popeye's)	448
West Tennessee Healthcare	352
Regional One Health	295
Tenet Healthcare Corporation	275
LHC Group, Inc.	270
FedEx	255
McDonald's Corporation	234

Source: Jobs4tn.gov Online Advertised Jobs, September 1, 2022



Source: Jobs4tn.gov Online Advertised Jobs, September 1, 2022

Figure 18



Source: THEC Fact Book, Tables 2.3 and 2.4.

Figure 19

The graph above lists the primary educational institutions in the West Region training students and current workers to fill available jobs. There are nine Tennessee Colleges of Applied Technology in the West Region, producing the most diploma and certificate completers. Community colleges provide associate degree completers, led by Southwest TN Community College. The University of Memphis granted more than three thousand bachelor's degrees in 2020-21, with another 1,000 granted by UT Martin. The University of Tennessee Medical Health Center grants a wide variety of health care degrees at the master's level and above. Information on the specific programs at each institution which provide training for occupations in demand in the West Region can be found on the TDLWD dashboard Tennessee Program Providers for Demand Occupations.

West Region Labor Force Summary

The population in the West Region in 2021 was estimated at 1,553,201, a decrease of 0.05 percent over 2020. However, both the Southwest and Northwest LWDA's increased in population. Females were 51.7 percent of the population in the West Region during 2021; they made up 52.2 percent of the population in Greater Memphis.

Table 12: West Region Labor Force

	Southwest LWDA	Northwest LWDA	Greater Memphis LWDA	West Region	State Total
Total Population 2020	248,834	247,922	1,064,474	1,561,230	6,772,268
Total Population 2021	251,495	248,308	1,053,398	1,553,201	6,975,218
Male Population 2021	123,180	122,257	503,846	749,283	3,420,001
Female Population 2021	128,315	126,051	549,552	803,918	3,555,217
Labor Force Participation Rate 2020 (5-Year Estimate)	53.85%	53.70%	63.28%	56.9%	58.34%
Labor Force Participation Rate 2021 (5-Year Estimate)	54.64%	53.26%	58.20%	55.4%	57.30%
Annual Average Unemployment Rate 2020 Percent	7.7%	7.0%	7.8%	7.5%	7.4%
Annual Average Unemployment Rate 2021 Percent	5.0%	4.5%	5.3%	4.9%	4.4%
Educational Attainment 25 Years and Over (2020) Some College Or Higher - Percent	44.81%	43.28%	60.11%	49.4%	51.48%
Poverty Estimate, All Ages, Percent (2020)	18.48%	18.18%	18.29%	18.3%	15.82%
Percentage of Unemployed with a Disability (2020)	13.00%	19.95%	11.82%	14.9%	16.03%
Percent of Those Not in the Labor Force with a Disability (2020)	35.86%	40.25%	30.16%	35.4%	35.03%

Sources: U.S Census Bureau, ACS five year estimates; TN Source: TN Department of Labor and Workforce Development, WIR²ED Division, Local Area Unemployment Statistics (LAUS).

Table 13: Educational Attainment, 2020

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	597,700	395,984	37,905	3,692,829	718,104	186,240
High school graduate only	188,666	143,892	10,577	1,181,472	243,466	53,619
Percent high school graduate only	31.57%	36.34%	27.90%	31.99%	33.90%	28.79%
High school graduate or higher	536,689	340,762	22,099	3,285,872	624,634	120,456
Percent high school graduate or higher	89.79%	86.05%	58.30%	88.98%	86.98%	64.68%
Bachelor degree or higher	184,529	72,718	5,517	1,075,103	151,390	30,753
Percent bachelor degree or higher	30.87%	18.36%	14.55%	29.11%	21.08%	16.51%

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

The labor force participation rate (LFPR) in the West Region in 2021 was 55.4 percent, 1.5 percentage points lower than the rate in 2020 and contributing to the state’s decline to 57.3 percent. The largest decrease was in the Greater Memphis LWDA, possibly associated with job decreases in leisure and hospitality and retail trade. However, the LFPR did increase in the Southwest LWDA. Unemployment rates in all three LWDA’s dropped in 2021, as the economy recovered from the pandemic, ending the year with an average rate of 4.9 percent. This was just 0.5 percentage points above the state average of 4.4 percent.

The lowest rate of educational attainment in 2020 was in the Northwest LWDA, with just under 43.3 percent of the population aged 25 years or more having some college or additional education. However, the rate in the Greater Memphis LWDA was 60.1 percent, 8.6 percentage points above the state rate and the highest in the West Region. Viewing this from an equity perspective, 30.87% of the white residents in the West Region age 25 years or more had earned bachelor’s degrees or higher, slightly more than the state rate, whereas Black and Hispanic or Latino residents had slightly lower rates of degree awards at that education level compared to the state rates. There were significant differences between the rates by race and ethnicity of earning bachelor’s degrees or above; the white rate was 30.87 compared to the Black rate of 18.36 and the Hispanic/Latino rate of 14.55 percent.

Table 14: West 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	Unemployd W/O Disability
Southwest LWDA	143,079	99,499	92,217	4,907	87,310	7,282	947	6,335
Northwest LWDA	141,348	98,372	93,018	7,553	85,465	5,354	1,068	4,286
Greater Memphis LWDA	640,213	487,251	452,399	24,215	428,184	34,852	4,118	30,734
West Region	924,640	685,122	637,634	36,675	600,959	47,488	6,133	41,355
Tennessee	4,079,574	3,083,188	2,920,333	185,847	2,734,486	162,855	24,000	138,855

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

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

rea	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	143,079	43,580	15,629	27,951	35.86%	64.14%
Northwest LWDA	141,348	42,976	17,299	25,677	40.25%	59.75%
Greater Memphis LWDA	640,213	152,962	46,126	106,836	30.16%	69.84%
West Region	924,640	239,518	79,054	160,464	33.01%	66.99%
Tennessee	4,079,574	996,386	328,485	667,901	32.97%	67.03%

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

Poverty rates declined 18.8 percent in 2019 to 18.3 percent in 2020, as federal aid was targeted to individuals with the greatest needs. The highest poverty rate in the region was in the Southwest LWDA at 18.48 percent. However, all LWDAs had poverty rates of more than 18 percent while the state rate was 15.8, notably lower. The 2021 rates should be lower, given the improving economy, but reducing poverty and increasing educational attainment should be key targets of workforce policy in this region.

Similar to 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 2019 rate of 14.8 percent in the West Region, with the highest rates in the Southwest and Greater Memphis LWDAs.

Table 16: Youth Unemployment 2020

Area	Labor Force	Unemployment	Rate
Southwest LWDA	15,405	2,557	16.60%
Northwest LWDA	15,768	2,072	13.14%
Greater Memphis LWDA	70,668	11,435	16.18%
West Region	101,840	16,065	15.77%

Sources: U.S. Census Bureau, 2016-2020 ACS, 2020, 5-year estimates.

Significant Barriers to Employment

The table above identifies numbers of individuals with significant barriers to employment in the West Region, using the latest data available. The West Region has the following populations compared to the state:

- 38 percent of individuals exiting from the TANF program within 24 months;
- 29 percent of those below poverty;
- 26 percent of the prison and jail population;
- 23 percent of the youth population; and
- 26 percent of single parent families.

Table 17: West TN Region - Significant Barriers to Employment

	Greater Memphis LWDA	Northwest LWDA	Southwest LWDA	West Region	State Total
Number of American Indians or Alaskan	406	266	129	801	4,519
Population Ages 15-19	69,648	16,165	16,618	102,431	426,381
Population Ages 20-24	70,675	15,910	15,917	102,502	445,895
Population Ages 55+	283,307	82,239	80,949	446,495	1,993,985
Number of Veterans	60,351	16,388	15,028	91,767	442,405
Number Below Poverty	190,698	43,310	43,999	278,007	965,213
Number With Disability	140,175	50,175	41,088	231,438	1,031,667
Number of Single Parent Families	2,23,254	46,824	46,729	316,807	1,218,991
Probationers and Parolees	10,534	2,379	2,746	15,659	67,592
Community Correction	421	306	1,501	2,228	7,370
Mental Health Court Statistics	35	0	0	35	80
Limited English Speaking	6,453	305	679	7,437	39,191
*Foster Care Services - Youth	137	30	23	190	801
Clients In Recovery Courts	220	93	73	386	1,587
In School Youth Exper. Homelessness in 2019	**	197	311	508	11,759
TANF 24 Months From Ending Total 2020	445	74	118	637	1,659
Prison and Jail Population	3,666	1,121	1,167	5,954	23,200

* Counties of commitment, not residence.

** Not available for this report

Sources: Population: U.S. Census Bureau, 2016-2020 American Community Survey 5-Year Estimates.

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

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

Limited English Speaking: U.S. Census Bureau, American Community Survey, 2020.

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

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

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

There is an unknown number of in-school youth experiencing homelessness; this information was not available from schools in Greater Memphis at the time of the report. This is important data that needs to be provided to workforce development. Mental health courts are being established, with Greater Memphis participating; the growing importance of these intervention services is being recognized nationally and needs expansion in Tennessee.