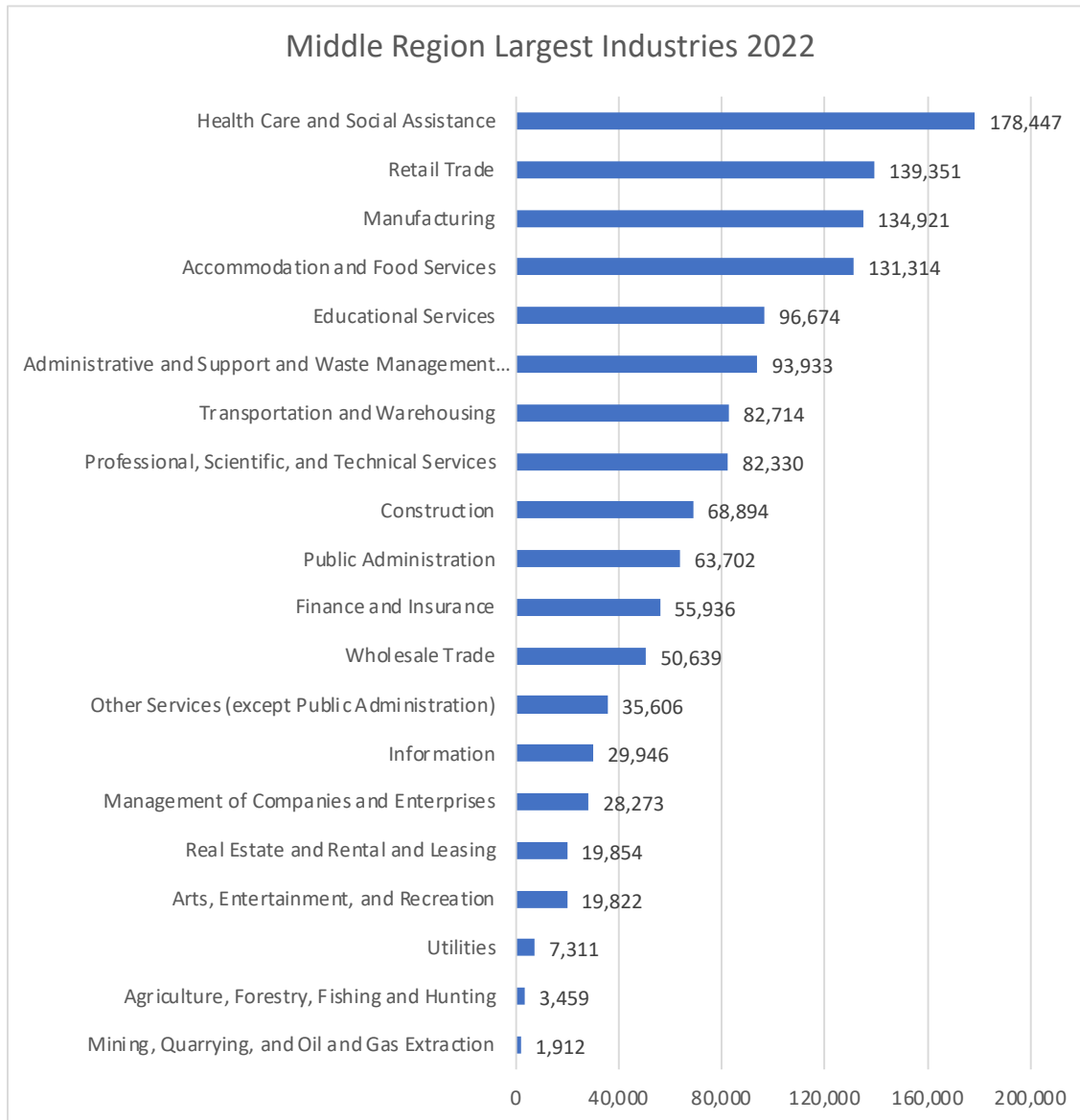


Tennessee's Middle Region's Economy | 2022

 <p>Employment</p>	<p>Total Nonfarm Employment 2022: 1,461,565 3% 2021: 1,420,558</p>	<p>New Jobs 2022: 41,007 2021: 69,580</p> <p>Strong</p>	<p>MSA Employment 2021-2022 Jackson: 4% Memphis: 6.6%</p> <p>Strong</p>
 <p>Employers</p>	<p>Total Number of Establishments 2022: 97,982 11% 2021: 88,539</p> <p>Strong</p>	<p>Total Payroll 2022: \$85.9B 2021: \$77.1B</p> <p>Strong</p>	<p>Counties that Increased Employment</p> <p>2022: 29 2021: 32</p> <p>Strong</p>
 <p>Wages & Income</p>	<p>Average Annual Wage 2022: \$54,880 21% 2021: \$45,231</p> <p>Strong</p>	<p>Middle Median Wage 2022: \$41,530 9% 2021: \$38,264</p> <p>Strong</p>	<p>Average Hourly Wages - Production Workers 2022: \$20.74 2021: \$18.04</p> <p>Strong</p>
 <p>Labor Force & Demographics</p>	<p>Unemployment Rate 2022: 3.0% 2021: 4.0%</p> <p>Strong</p>	<p>Labor Force 2022: 1,506,260 2021: 1,476,473</p>	<p>Unemployment Rates Youth 2021: 9.89% % In Poverty, 2021: 13.4%</p> <p>Strong</p>
 <p>Job Outlook</p>	<p>Ratio of Unemployed to Job Openings June 2023: 0.23 June 2022: 1.65</p> <p>Strong</p>	<p>Projected Annual Growth Rate, All Occupations 2020-2030: 1.93% 2018-2028: 1.07%</p> <p>Strong</p>	<p>Projected Job Openings 2020-2030: 225,261 2018-2028: 178,632</p> <p>Strong</p>

**Figure 15**

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

Middle Region's Economy, 2021-2022

Total employment in the Middle Region, excluding agriculture and the self-employed, increased to 1,461,565. Labor force also increased in the Middle region.

The Middle Region consists of three Local Workforce Development Areas: Northern Middle, Southern Middle, and Upper Cumberland, encompassing a total of 40 counties. Of these, 29 counties increased employment as compared to 40 the year prior. This is an expected pattern as the year prior was a year of recovery for the Tennessee economy. The average number of establishments increased to 97,982 over the year and payroll increased by 11.4 percent to \$85.9 billion. The increase in payroll was at a faster rate than the state.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, increased by over 20 percent to \$54,880 from \$45,231. The median occupational wage increased by nine percent to \$41,530, which is above the state's median.

As previously mentioned, the average unemployment rate decreased from 2021 to 2022 to 3.0 percent, which is less than the state annual average. Youth unemployment in 2021 (the latest data available) is lower compared to the state rate of 11.4 percent. The percent of those in poverty was stable at 13.4 percent, below the state rate, yet higher for the Middle Region than last year.

To summarize: In 2022 compared to 2021, the Middle Region saw an increase in employment, labor force, and wages, while the unemployment rate decreased to below the state level. Payroll increased faster for the Middle Region than the rest of the state. The level of the annual average industry wage increased by more than 20 percent, and the median occupational wage also saw significant growth. Expansion of health care and information technology services as well as electric vehicle and battery manufacturing will continue to add to skill requirements and employment in the region.

Middle TN Industries and Occupations (2018-2022)

Total employment in the Middle Region in 2022, excluding self-employed and agricultural workers, was 1,461,565. The five largest industry sectors in 2022 were:

- Healthcare and social assistance (178,447)
- Retail Trade (135,359)
- Manufacturing (139,351)
- Accommodation and Food Services (131,314)
- Educational Services (96,674)

Compared to 2018, the industries adding the most new workers included the transportation and warehousing (20,657 new jobs), professional, scientific, and technical (13,049) and construction (13,705) industries. Only one industry, manufacturing, lost jobs from 2018 to 2022 (1,009). With this increase, accommodation and food services reported a growth of 3% since 2018, thus increasing its employment numbers post-pandemic. The most rapid growth was in the information, construction and transportation and warehousing sectors. The industries with the highest earnings per worker were the management of companies and enterprises, finance and insurance, professional, scientific, and technical, and information industries. The lowest earnings per employee were in the accommodation and food services industries.

Middle Tennessee Local Workforce Development Areas and Counties

Upper Cumberland Tennessee LWDA

Cannon	Overton
Clay	Pickett
Cumberland	Putnam
DeKalb	Smith
Fentress	Van Buren
Jackson	Warren
Macon	White

Southern Middle Tennessee LWDA

Bedford	Lincoln
Coffee	Marshall
Franklin	Maury
Giles	Moore
Hickman	Perry
Lawrence	Wayne
Lewis	

Northern Middle Tennessee LWDA

Cheatham	Rutherford
Davidson	Stewart
Houston	Sumner
Humphreys	Trousdale
Montgomery	Williamson
Robertson	Wilson



Figure 16

Source: TN Department of Labor and Workforce Development, WIR²ED Division, QCEW 2022

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

Middle Region Industries	2018 Jobs	2022 Jobs	Change in Jobs	% Change in Jobs	2018 Earnings Per Worker	2022 Earnings Per Worker	% Change in Earnings Per Worker
Transportation and Warehousing	62,057	82,714	20,657	33%	48,821.14	58,904.27	21%
Construction	55,189	68,894	13,705	25%	58,636.95	72,518.63	24%
Professional, Scientific, and Technical Services	69,281	82,330	13,049	19%	88,958.21	105,260.82	18%
Health Care and Social Assistance	168,988	178,447	9,459	6%	56,048.13	67,741.83	21%
Information	24,247	29,946	5,699	24%	72,040.91	101,251.23	41%
Management of Companies and Enterprises	23,081	28,273	5,192	22%	114,324.21	135,081.30	18%
Wholesale Trade	45,591	50,639	5,048	11%	73,210.30	89,717.56	23%
Finance and Insurance	50,898	55,936	5,038	10%	90,548.57	113,241.16	25%
Administrative and Support and Waste Management and Remediation Services	89,231	93,933	4,702	5%	37,439.42	50,142.93	34%
Accommodation and Food Services	127,583	131,314	3,731	3%	20,837.80	27,621.14	33%
Retail Trade	136,210	139,351	3,141	2%	32,758.24	40,156.24	23%
Educational Services	93,940	96,674	2,734	3%	44,467.36	53,177.46	20%
Arts, Entertainment, and Recreation	17,339	19,822	2,483	14%	76,407.32	87,533.71	15%
Public Administration	61,889	63,702	1,813	3%	50,057.19	58,768.78	17%
Other Services (except Public Administration)	34,579	35,606	1,027	3%	35,261.28	46,598.81	32%
Utilities	6,940	7,311	371	5%	75,741.87	88,648.23	17%
Real Estate and Rental and Leasing	19,490	19,854	364	2%	53,455.13	72,564.94	36%
Agriculture, Forestry, Fishing and Hunting	3,151	3,459	308	10%	33,960.20	41,978.53	24%
Mining, Quarrying, and Oil and Gas Extraction	1,682	1,912	230	14%	83,481.72	98,074.82	17%
Manufacturing	135,930	134,921	-1,009	-1%	57,468.46	66,313.10	15%

Source: TN Department of Labor and Workforce Development, QCEW Annual Averages, 2018 and 2022

Middle Region Occupational Employment

The office and administrative support occupational group remained the largest in the Middle Region, according to the Occupational Employment and Wages Survey for 2022, which provides data on all industries except agriculture and the self-employed. Employment in this group in May 2022 was 184,660; however, it decreased employment by 3% since 2015. The next three largest industries were transportation and material moving, sales and related, and food preparation and serving. Sales and related jobs declined during the pandemic as e-commerce expanded. This group in 2022 has recovered and has employment at about the same level as in 2015.

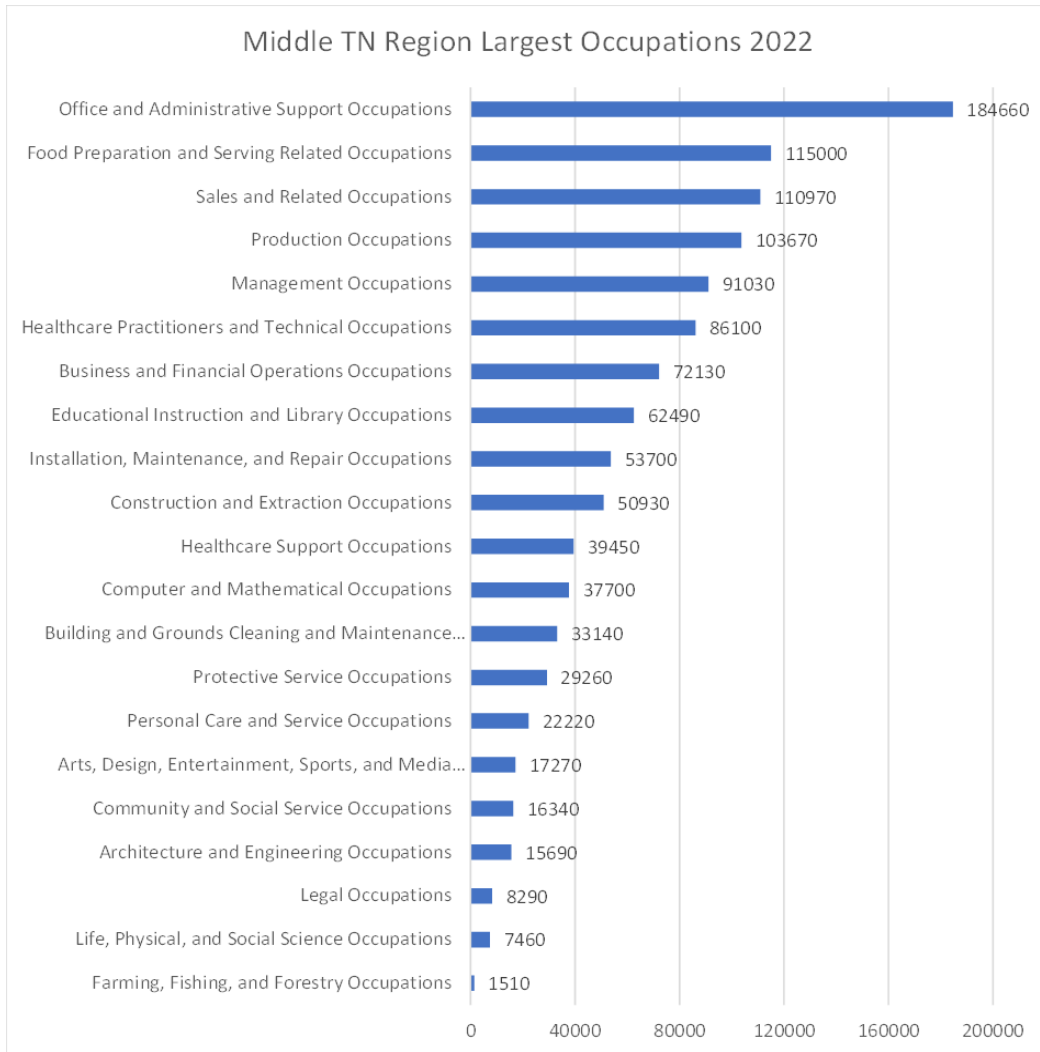


Figure 17

Source: TN Department of Labor and Workforce Development, WIR²ED, OEWS, May 2022

Occupational groups that added the most new jobs from 2015 to 2022 included transportation and material moving, computer and mathematical, business and finance, management, healthcare practitioners and technical, and construction. Office and administrative support and personal care and service lost the most jobs over the seven-year period.

Other than management, the occupational groups with the highest median earnings included computer and mathematical, architecture and engineering, legal, healthcare practitioners and technical, and business and finance. These earnings results show the importance of STEM education and training in achieving higher earning.



Figure 18

Source: TN Department of Labor and Workforce Development, WIR²ED, OEWS, May 2022

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, with the top five listed as nursing credentials, CPR, commercial driver license, CPA, and nursing leadership certifications. For June 2023, the most requested tools and technologies include facility with Microsoft Office and Power Point, SQL query language and Python, operation of cash registers and forklifts, and use of personal protective equipment.

Of the top 10 employers posting jobs in the Middle Region on August 1, 2023, 4 included hospitals and other healthcare employers, as well as Kroger, Metro Nashville public schools, 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, sales, and food related occupations.

Table 19: Middle Region Occupational Job Growth 2015-2022

Middle TN Occupational Group	May 2015 Jobs	May 2022 Jobs	Change in Jobs	% Change in Jobs	2022 Median Hourly Earnings
Architecture and Engineering	16,690	15690	-1,000	-6%	36.93
Arts, Design, Entertainment, Sports, and Media	15,140	17270	2,130	14%	21.92
Building and Grounds Cleaning and Maintenance	29,020	33140	4,120	14%	14.51
Business and Financial Operations	48,390	72130	23,740	49%	30.44
Community and Social Service	12,130	16340	4,210	35%	22.45
Computer and Mathematical	23,120	37700	14,580	63%	38.44
Construction and Extraction	34,270	50930	16,660	49%	22.14
Educational Instruction and Library	59,690	62490	2,800	5%	23.45
Farming, Fishing, and Forestry	1,330	1510	180	14%	16.74
Food Preparation and Serving Related	103,380	115000	11,620	11%	12.73
Healthcare Practitioners and Technical	70,080	86100	16,020	23%	31.63
Healthcare Support	31,460	39450	7,990	25%	15.49
Installation, Maintenance, and Repair	48,500	53700	5,200	11%	23.12
Legal	6,830	8290	1,460	21%	39.56
Life, Physical, and Social Science	5,640	7460	1,820	32%	30.41
Management	72,020	91030	19,010	26%	49.49
Office and Administrative Support	189,450	184660	-4,790	-3%	18.88
Personal Care and Service	25,270	22220	-3,050	-12%	14.01
Production	104,070	103670	-400	0%	18.66
Protective Service	23,890	29260	5,370	22%	18.91
Sales and Related	111,400	110970	-430	0%	15.84
Transportation and Material Moving	92,170	150850	58,680	64%	17.65
Total, All Occupations	1,123,490	1,439,386	315,896	28%	19.97

Source: TN Department of Labor and Workforce Development, WIR²ED, OEWS, May 2015 and May 2022

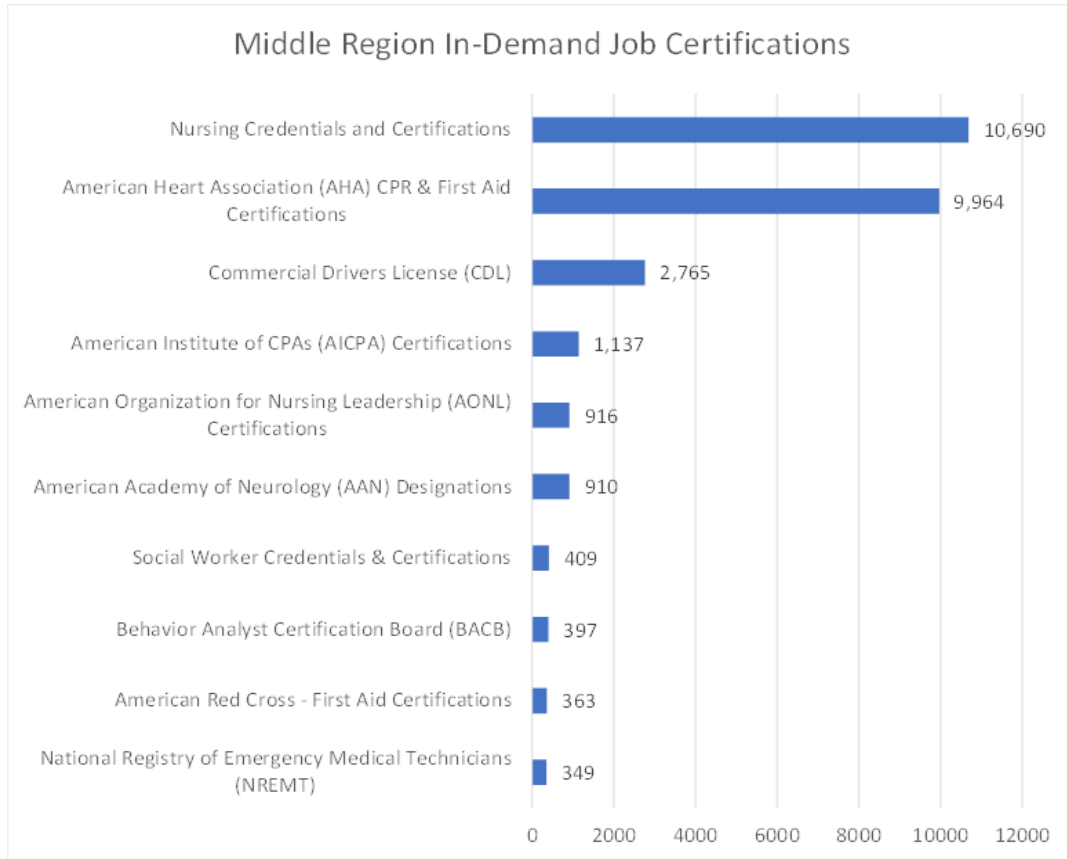


Figure 19

Source: jobs4tn.gov Online Advertised Jobs, June 2023

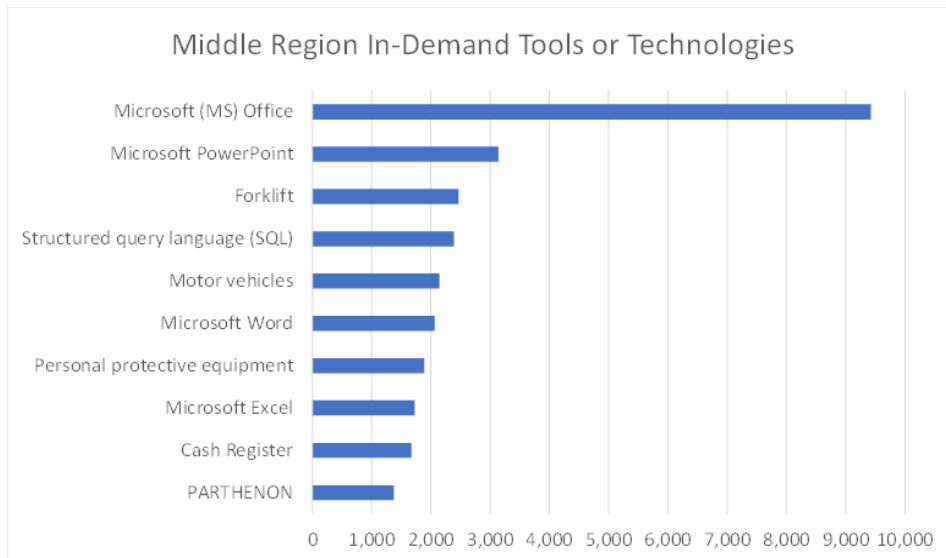


Figure 20

Source: jobs4tn.gov Online Advertised Jobs, June 2023

Table 20: Top Employers Posting Jobs – Middle Region

Rank	Employer Name	Job Openings
1	HCA Healthcare, Inc.	3,284
2	Vanderbilt University Medical Center	1,233
3	Metropolitan Nashville Public Schools	626
4	Carrols Corporation	524
5	The Kroger Co.	404
6	Bright Spring Health Services	401
7	National HealthCare Corporation	369
8	Sonic Corp.	351
9	McDonald’s Corporation	347
10	MAPCO Express, Inc.	324

Source: jobs4tn.gov Online Advertised Jobs, August 2023

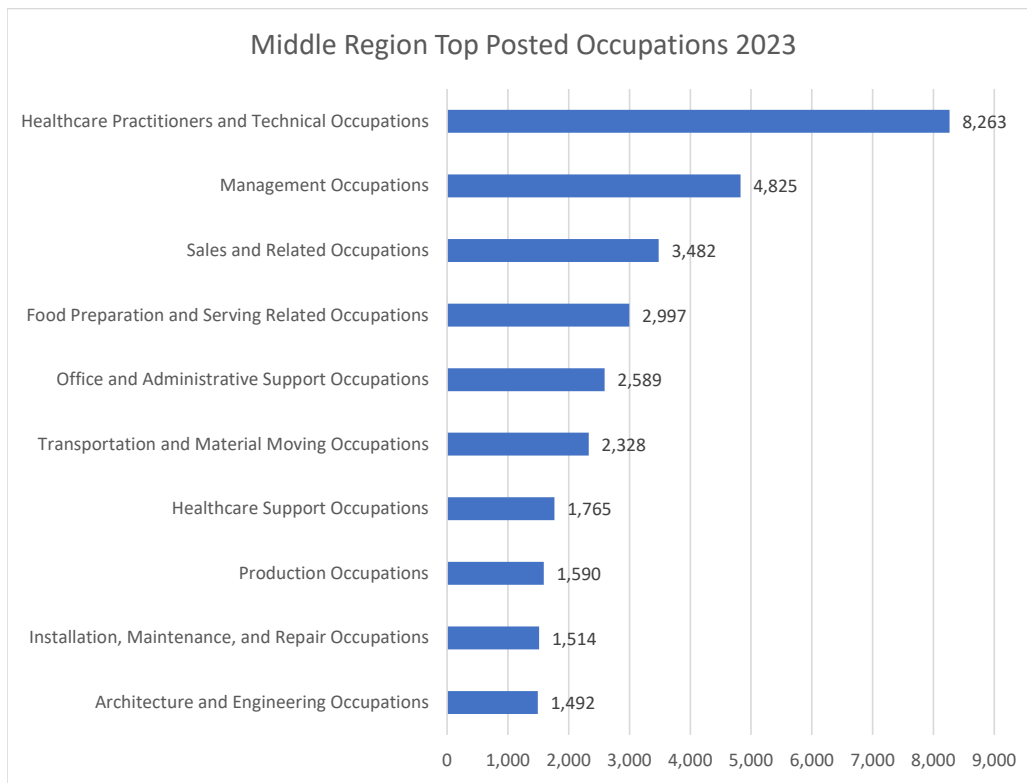


Figure 21

Source: jobs4tn.gov Online Advertised Jobs, June 2023

Middle Region Labor Force Summary

The population in the Middle Region in 2022 was estimated at 3,007,525, an increase of 1.8 percent over 2021, with all three LWDA's experiencing population gains. Three of every four new residents of the Middle Region reside in Northern Middle Tennessee.

Table 21: Middle Region Labor Force

	Upper Cumberland LWDA	Southern Middle LWDA	Northern Middle LWDA	Middle Region	State Total
Total Population 2021	366,049	473,355	2,114,956	2,954,360	6,968,351
Total Population 2022	370,024	481,777	2,153,724	3,007,525	7,051,339
Male Population 2021	182,869	231,061	1,043,119	1,457,049	3,418,920
Female Population 2021	187,513	238,400	1,090,017	1,515,930	3,595,814
Labor Force Participation Rate 2021 (5-Year Estimate)	52.03%	58.35%	68.40%	59.6%	57.30%
Labor Force Participation Rate 2022 (5-Year Estimate)	52.10%	56.90%	67.20%	58.73%	58.60%
Annual Average Unemployment Rate 2021 Percent	4.1%	4.3%	3.6%	4.0%	4.4%
Annual Average Unemployment Rate 2022 Percent	2.90%	2.90%	2.30%	3.70%	3.2%
Educational Attainment 25 Years and Over (2021) Some College Or Higher - Percent	43.20%	46.94%	66.78%	52.3%	58.53%
Poverty Estimate, All Ages, Percent (2021)	16.70%	12.59%	11.00%	13.4%	14.30%
Percentage of Unemployed with a Disability (2021)	20.03%	18.82%	14.26%	17.7%	17.80%
Percent of Those Not in the Labor Force with a Disability (2021)	36.43%	34.07%	25.76%	32.1%	31.10%

Source: TN Department of Labor and Workforce Development, WIR²ED Division, LAUS, and U.S. Census Bureau, ACS five-year estimates

Table 22: Educational Attainment, 2021

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	1,534,019	230,544	100,658	3,701,360	725,820	194,222
High school graduate only	474,318	68,564	19,937	1,171,517	247,651	54,356
Percent high school graduate only	30.92%	29.74%	19.81%	31.65%	34.12%	27.99%
High school graduate or higher	1,388,732	206,950	68,012	3,317,421	636,892	125,079
Percent high school graduate or higher	90.53%	89.77%	67.57%	89.63%	87.75%	64.40%
Bachelor degree or higher	512,239	65,703	18,717	1,114,827	159,001	33,770
Percent bachelor degree or higher	33.39%	28.50%	18.59%	30.12%	21.91%	17.39%

Source: US Census Bureau, ACS five-year estimates

The labor force participation rate (LFPR) in the Middle Region in 2022 was 58.73 percent, somewhat lower than the previous year. However, despite this, the state's labor force participation rate increased to 58.6 percent in 2022. The Middle Region's participation rate mirrors the state's. The largest decrease for the Middle Region was in the Southern Middle LWDA, which was expected given the negative population growth. A significant decrease in labor force participation rate was also seen in the Northern Middle area. Unemployment rates in all three LWDA's dropped in 2023, as the economy recovered from the pandemic, ending the year with an average rate of 3.0 percent, lower than the state's average of 3.4 percent.

The Upper Cumberland LWDA reported the lowest rate of educational attainment in 2021, with 43.2 percent of the population aged 25 years or more having some college or additional education. In contrast, the rate in the Northern Middle LWDA was 66.8 percent, well above the state's average.

The Middle Region of the state of Tennessee shows significant disparities concerning the post high school educational attainment of individuals based on their race or ethnic heritage. These disparities are not unique to the Middle Region, as they reflect a pattern throughout the whole state. In the Middle Region, the attainment of a bachelor's degree or higher by individuals who are over the age of 25 and identify their race as White is 33.39 percent, which shows a significant disparity when compared to those who identify their race as Black (28.50), and those who identify their heritage as Hispanic or Latino (18.59).

Table 23: Disability Status of Those in the Labor Force, 2021

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	193,662	137,182	130,178	10,771	119,407	7,004	1403	5,601
Southern Middle LWDA	269,265	200,495	191,252	13,403	177,849	9,243	1,740	7,503
Northern Middle LWDA	1,288,279	1,034,826	991,170	59,579	931,591	43,656	6,226	37,340
Middle Region	1,751,206	1,372,503	1,312,600	83,753	1,228,847	59,903	9,369	50,444
Tennessee	4,171,582	3,158,913	2,994,217	189,457	2,804,760	166,696	29,324	135,372

Source: U.S. Census Bureau, ACS Five-year Estimates

Table 24: Disability Status of Those Not in the Labor Force, 2021

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	193,662	54,480	20,707	35,773	38.01%	65.66%
Southern Middle LWDA	296,265	68,770	23,434	45,336	34.08%	65.92%
Northern Middle LWDA	1,288,279	253,453	65,306	188,147	25.77%	74.23%
Middle Region	1,778,206	376,703	109,447	269,256	29.05%	71.48%
Tennessee	4,171,582	1,015,669	315,415	700,254	31.05%	68.95%

Source: U.S. Census Bureau, ACS Five-year Estimates

Poverty rates declined from 13.9 percent in 2020 to 13.4 percent for the Middle Region in 2021, as federal aid was targeted to individuals with the greatest needs. The highest poverty rate in the region was in the Upper Cumberland LWDA at 16.7 percent. Upper Cumberland LWDA was the only LWDA in the Middle Region that had poverty rates higher than the state's average. The 2022 rates should have been lower, given the improving economy; reducing poverty and increasing educational attainment should be key targets of workforce policy in this region. Like the state, about a third of those not in the labor force have a disability, with Upper Cumberland LWDA having the highest rate.

Youth unemployment in the Middle Region increased slightly from 9.63 in 2020 to 9.89 in 2021. All LWDAs in the Middle Region reduced their unemployment rates, but the youth labor force increased slightly over the year. Both the Southern and Northern Middle showed significant improvements in youth unemployment.

Table 25: Youth Unemployment 2021

Area	Labor Force	Unemployment	Rate
Upper Cumberland LWDA	20,867	2,546	12.20%
Southern Middle LWDA	29,118	2,576	8.85%
Northern Middle LWDA	160,777	13,875	8.63%
Middle Region	210,762	18,997	9.89%

Source: U.S. Census Bureau, ACS Five-year Estimates

Significant Barriers to Employment

Table 26 identifies numbers of individuals with significant barriers to employment in the Middle Region, using the latest data available. The Middle Region has the following populations greater than its share of the population in the state:

- 43 percent of individuals on probation or parole;
- 58 percent of those with limited English- speaking ability; and
- 40 percent of those in recovery courts.

Table 26: Middle TN Region – 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	5,580	1,280	929	7,789	15,219
Population Ages 15-19	134,346	31,323	22,134	187,803	438,290
Population Ages 20-24	139,907	26,953	22,911	189,771	443,703
Population Ages 55+	509,632	158,632	126,627	794,891	2,022,778
Number of Veterans 2022	119,735	30,289	22,849	172,873	423,042
Number Below Poverty	213,708	58,774	58,453	330,935	955,929
Number With Disability	238,769	74,512	65,836	379,117	1,025,259
Number of Single Parent Families	341,445	73,965	58,825	474,235	1,234,824
Probationers and Parolees 2023	22,572	4,305	3,629	30,506	71,142
Community Correction 2023	1,648	5	106	1,759	3,401
Mental Health Court Statistics (FY 2023)	47	0	0	47	96
Limited English Speaking	22,856	821	64	24,331	42,056
Foster Care Services - Youth Aged 2022	192	68	52	312	801
Clients In Recovery Courts (2023)	400	45	108	553	1,399
Disadvantaged Youth and Adults	157,655	45,750	40,300	243,705	693,590
TANF 24 Months from 2022	348	112	60	520	1,816
Prison Population 2023	4,263	2,437	0	6,700	19,063
Jail Population 2023	5,646	1,901	1,515	9,065	25,696

Sources: **Population:** U.S. Census Bureau, 2017-2021 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, 2021. **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>. TEGl 01-23 Updated Disadvantaged Youth and Adults Data