




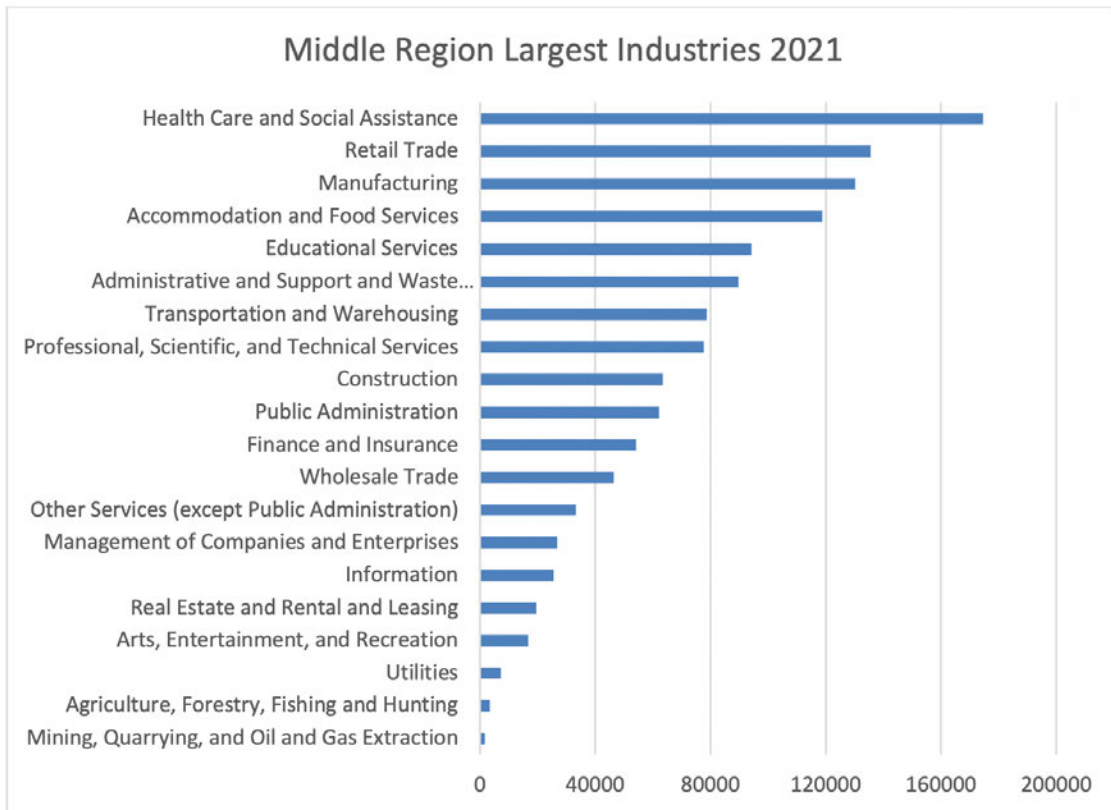


Tennessee Middle Region's Economy | 2021

 <p>Employment</p>	<p>Total Employment 2021: 1,420,558 5.2% 2020: 1,350,978 Stronger</p>	<p>New Jobs 2021: 69,580 2020: -79,782 Stronger</p>	<p>MSA Employment 2020-2021 Clarksville: 4.0% Nashville: 5.7% Stronger</p>
 <p>Employers</p>	<p>Total Number of Establishments 2021: 88,359 10.3% 2020: 80,123 Stronger</p>	<p>Total Wages 2021: \$77.1 Billion 11.7% 2020: \$69 Billion Stronger</p>	<p>Counties Increased Employment 2021: 32 2020: 7 Stronger</p>
 <p>Wages & Income</p>	<p>Average Annual Wage 2021: \$45,231 5.7% 2020: \$42,812 Stronger</p>	<p>Middle Median Wage 2021: \$38,264 -1.8% 2020: \$38,964 Challenge</p>	<p>Counties Increased Annual Wages 2021: 40 2020: 36 Stronger</p>
 <p>Labor Force & Demographics</p>	<p>Unemployment Rate 2021: 4.0% -43.7% 2020: 7.1% Stronger</p>	<p>Labor Force 2021: 1,476,473 1.5% 2020: 1,454,573 Stronger</p>	<p>Unemployment Rates Youth 2020: 9.6% % In Poverty, 2020: 13.9% Stronger</p>
 <p>Job Outlook</p>	<p>Ratio of Unemployed to Job Openings June 2021: 1.65 -25.34% June 2020: 2.21 Stronger</p>	<p>Projected Annual Growth Rate, All Occupations 2018-2028: 1.07% Stronger</p>	<p>Projected Annual Avg. Job Openings 2018-2028: 178,632 Stronger</p>

Middle Region Overview



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

Figure 20

Middle Region's Economy, 2020-2021

Total employment in the Middle Region, excluding agriculture and the self-employed, increased from 1,350,978 in 2020 to 1,420,588 in 2021, an increase of 5.2 percent or 69,580 jobs (see Middle Region Summary page 47). This rate of job growth was faster than the state. It was led by the rapid job growth in the metro areas of Nashville and Clarksville, which grew by 5.7 and 4.0 percent, respectively.

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, all counties increased in employment from 2020 to 2021, compared to 32 the previous year. The average number of establishments increased to 88,359 over the year and payroll increased by 11.7 percent to \$77.1 billion. The increase in payroll was at a faster rate than the state and accounted for 43 percent of the state's total wages.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, increased by 5.7 percent to \$45,231. The median occupational wage decreased by 1.8 percent to \$38,264, still above the state's median.

Regarding the labor force, the average unemployment rate decreased from 2020 to 2021 to 4.0 percent, lower than the state's average of 4.3 percent. The labor force increased over the year by nearly 22,000 persons. Youth unemployment in 2020 (the latest data available) increased to slightly to 9.6 percent, compared to the state rate of 11.4 percent. The percent of those in poverty was stable at 13.1 percent, below the state rate. In 2021 the number of unemployed compared to the number of job listings on the state job bank, jobs4tn.gov, was 1.65 percent, decreasing from the higher rate in 2020 but still indicating more than one unemployed individual compared to the number of jobs in the region.

To summarize: In 2021 compared to 2020, the Middle Region saw positive growth in employment, with metropolitan areas leading the growth. Payroll increased faster than the rest of the state. The level of the annual average industry wage increased by more than five percent, but the median occupational wage declined slightly. The unemployment rate decreased, and the labor force increased by 1.5 percent, a higher rate of growth than that of the state. 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 (2018-2021)

Total employment in the Middle Region in 2021, excluding self-employed and agricultural workers, was 1,420,558. The five largest industry sectors in 2021 were

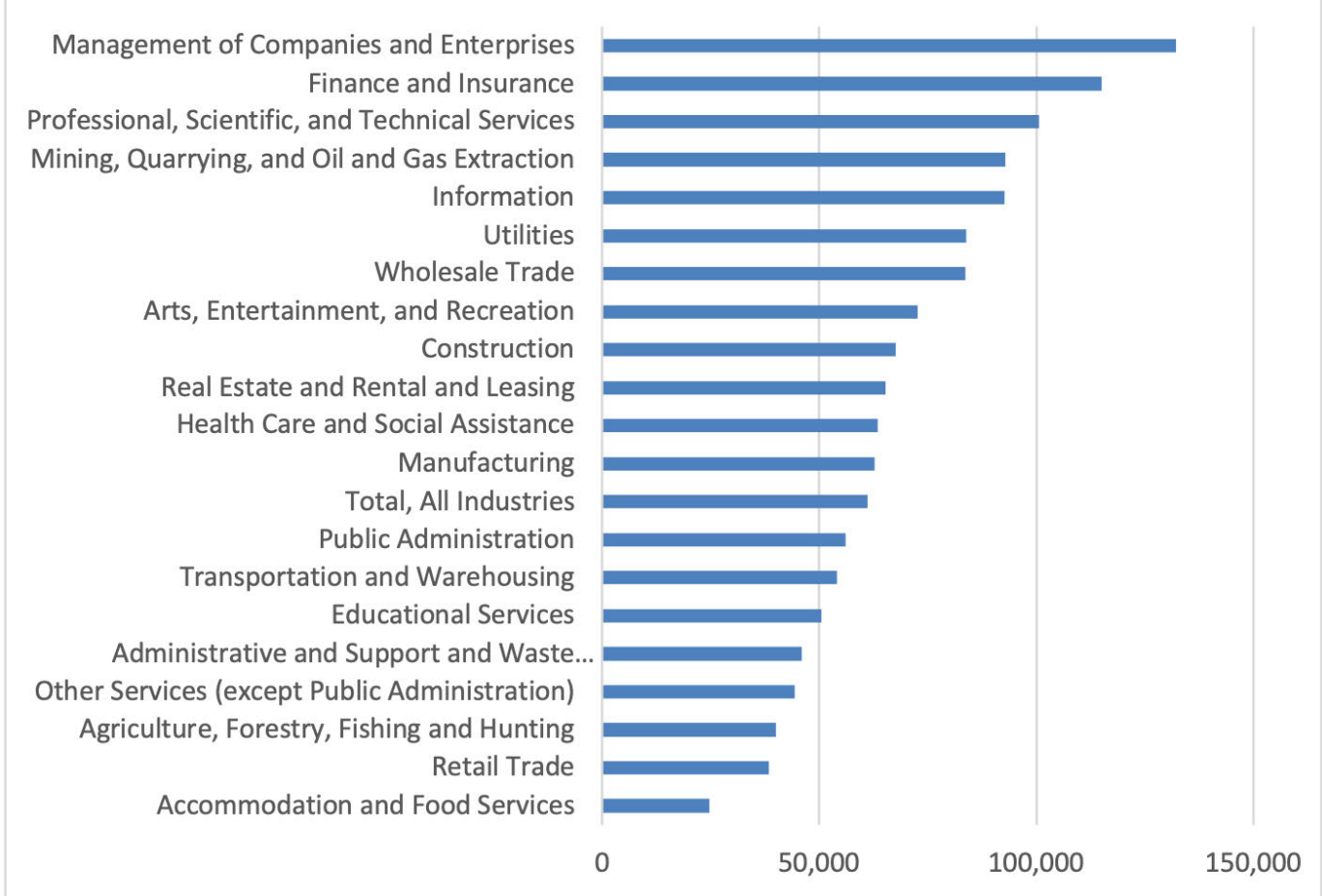
- Health care and social assistance (174,557 jobs)
- Retail trade (135,615)
- Manufacturing (130,205)
- Accommodation and food services (118,753)
- Educational services (94,255)

Compared to 2018, the industries adding the most new workers included the transportation and warehousing (16,663 new jobs), professional, scientific, and technical (8,359) and construction (8,326) industries. However, some of the largest industries lost jobs from 2018 to 2021, including manufacturing (5,725), retail trade (595), and accommodation and food services (8,830), which was still 7 percent below its employment level

of 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 finance and insurance sectors, followed by other services and the administrative and support and waste management and remediation sectors. The industries with the highest earnings per worker were the management of companies and enterprises, finance and insurance, professional, scientific and technical, and mining, quarrying, and oil and gas extraction industries. The lowest earnings per employee were in the accommodation and food services industries.

Middle Tennessee Local Workforce Development Areas and Counties	
<u>Upper Cumberland Tennessee</u>	
Cannon	Overton
Clay	Pickett
Cumberland	Putnam
Dekalb	Smith
Fentress	Van Buren
Jackson	Warren
Macon	White
<u>Southern Middle Tennessee</u>	
Bedford	Lincoln
Coffee	Marshall
Franklin	Maury
Giles	Moore
Hickman	Perry
Lawrence	Wayne
Lewis	
<u>Northern Middle Tennessee</u>	
Cheatham	Rutherford
Davidson	Stewart
Dickson	Sumner
Houston	Trousdale
Humphreys	Williamson
Montgomery	Wilson
Robertson	

Middle Region Top Industry Earnings- 2021 Earnings Per Worker



Source: TN Dept of Labor and Workforce Development, WIR²ED, QCEW 2021 Annual Data

Figure 21

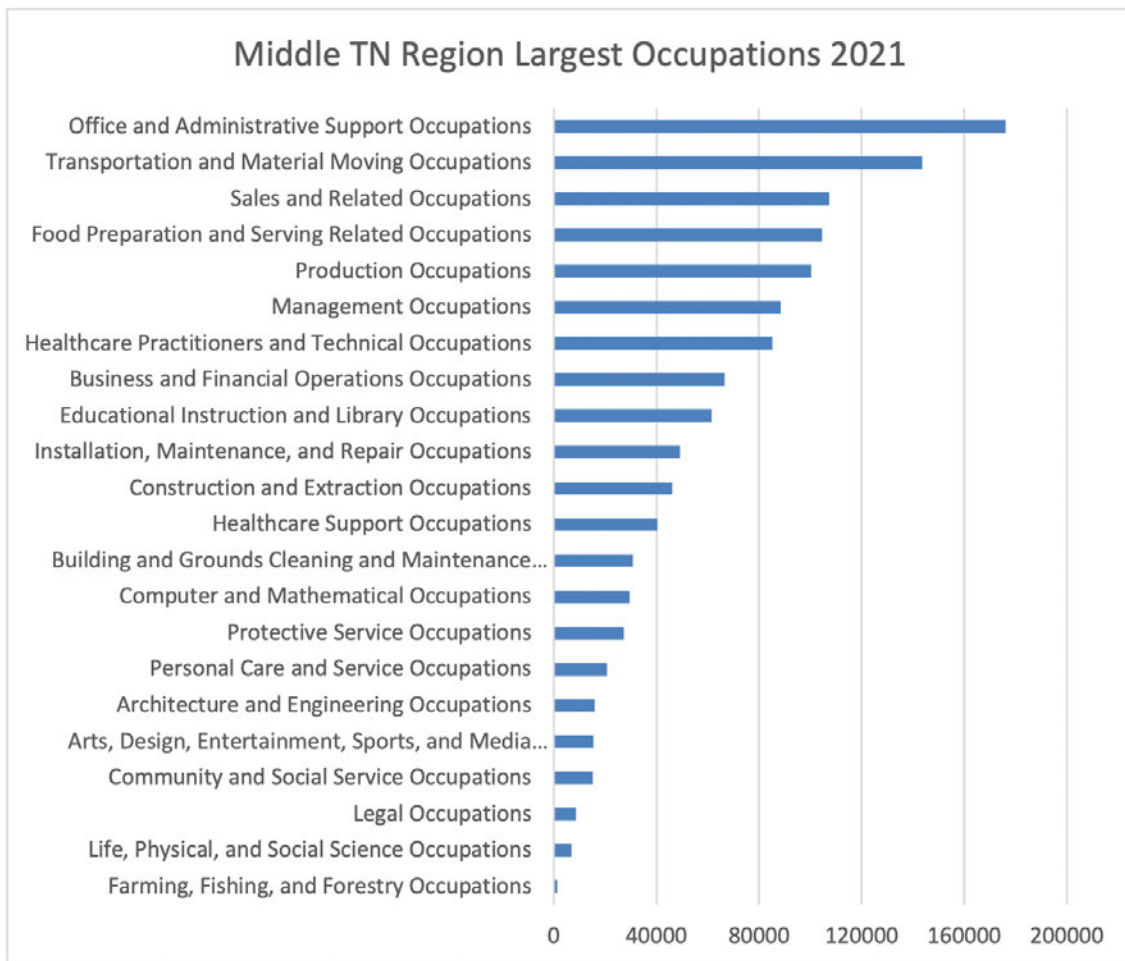
Table 18: Fastest Growing Industries in the Middle Region are Transportation and Warehousing, Management of Companies, and Construction

Middle 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	62,057	78,720	16,663	27%	48,821.14	54,144.19	11%
Management of Companies and Enterprises	23,081	26,787	3,706	16%	114,324.21	132,241.60	16%
Construction	55,189	63,515	8,326	15%	58,636.95	67,613.92	15%
Professional, Scientific, and Technical Services	69,281	77,640	8,359	12%	88,958.21	100,607.53	13%
Agriculture, Forestry, Fishing and Hunting	3,151	3,363	212	7%	33,960.20	40,142.19	18%
Finance and Insurance	50,898	54,199	3,301	6%	90,548.57	114,956.97	27%
Information	24,247	25,577	1,330	5%	72,040.91	92,697.75	29%
Health Care and Social Assistance	168,988	174,557	5,569	3%	56,048.13	63,521.59	13%
Utilities	6,940	7,158	218	3%	75,741.87	83,803.81	11%
Mining, Quarrying, and Oil and Gas Extraction	1,682	1,721	39	2%	83,481.72	92,865.34	11%
Wholesale Trade	45,591	46,399	808	2%	73,210.30	83,654.70	14%
Real Estate and Rental and Leasing	19,490	19,607	117	1%	53,455.13	65,297.08	22%
Administrative and Support and Waste Management and Remediation Services	89,231	89,673	442	0%	37,439.42	45,987.98	23%
Educational Services	93,940	94,255	315	0%	44,467.36	50,513.75	14%
Public Administration	61,889	62,084	195	0%	50,057.19	56,143.52	12%
Retail Trade	136,210	135,615	-595	0%	32,758.24	38,449.26	17%
Arts, Entertainment, and Recreation	17,339	16,698	-641	-4%	76,407.32	72,607.52	-5%
Other Services (except Public Administration)	34,579	33,287	-1,292	-4%	35,261.28	44,432.78	26%
Manufacturing	135,930	130,205	-5,725	-4%	57,468.46	62,715.45	9%
Accommodation and Food Services	127,583	118,753	-8,830	-7%	20,837.80	24,806.44	19%

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

Middle Region Occupational Employment

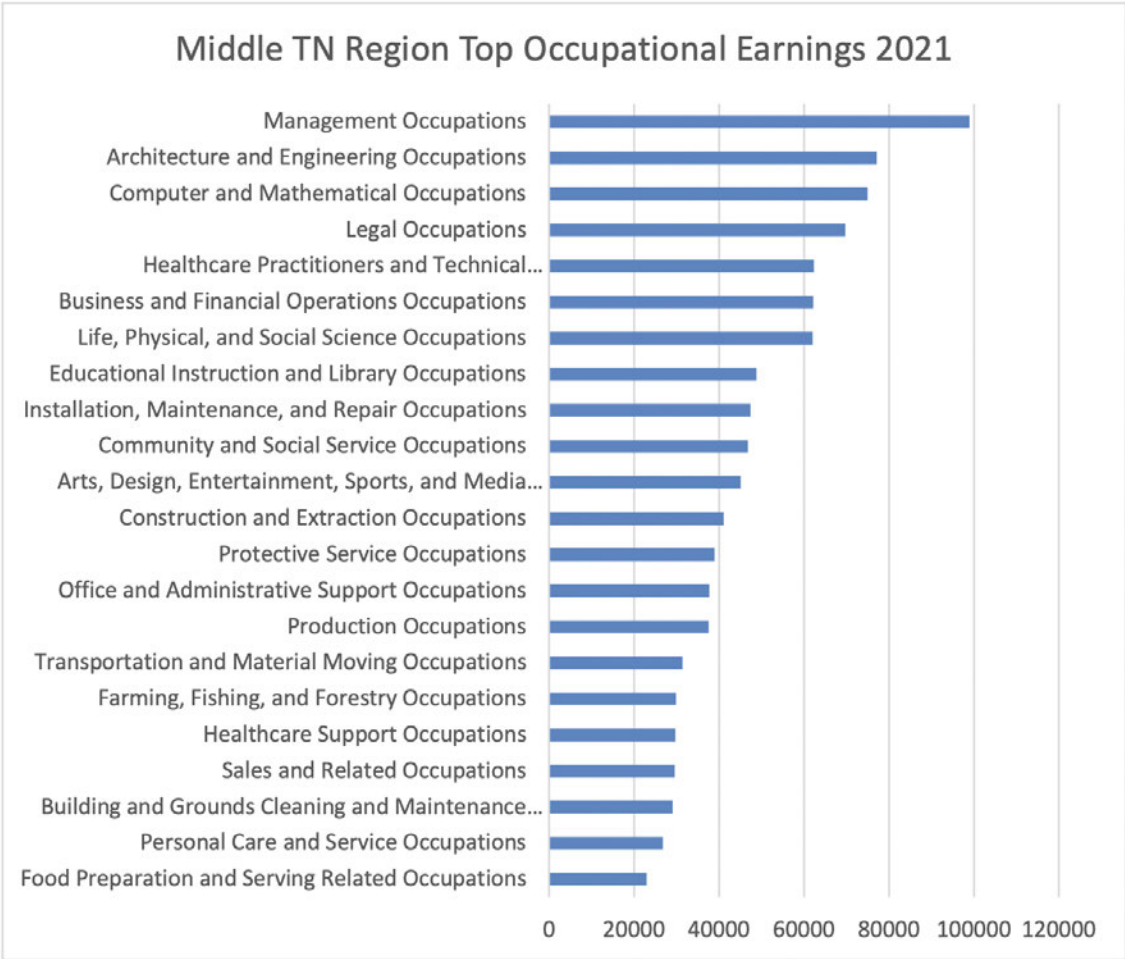
The office and administrative support occupational group remained the largest in the Middle Region, according to the Occupational Employment and Wages Survey for 2021, which provides data on all industries except agriculture and the self-employed. Employment in this group in May 2021 was 175,980; however, it decreased employment by 13,470 since 2015. The next three largest industries were transportation and material moving, sales and related, and food preparation and serving. Sales and related jobs also declined since 2015, by 4,140 jobs.



Source: TN Dept of Labor and Workforce Development, WIR²ED, OEWS, May 2021

Figure 22

Occupational groups which added the most new jobs from 2015 to 2021 included transportation and material moving, 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 six 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 earnings.



Source: TN Dept of Labor and Workforce Development, WIR²ED, OEWS, May 2021

Figure 23

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 social worker certifications. For June 2022, the most requested tools and technologies include facility with Microsoft Office and Power

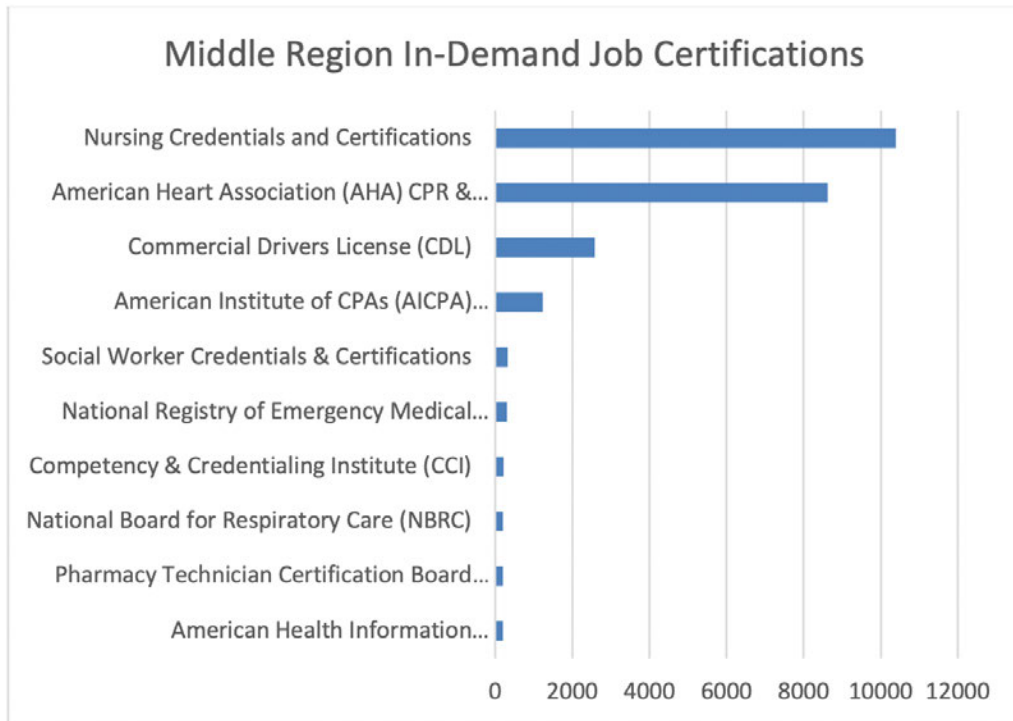
Point, SQL query language and Python, operation of cash registers and forklifts, and use of personal protective equipment.

Of the top 10 employers posting jobs in the Middle Region on September 1, 2022, 6 included hospitals and other healthcare employers, as well as Kroger, Amazon, 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, transportation and material moving. More than 2000 job postings were for computer and mathematical jobs.

Table 19: Middle Region Job Growth 2015-2021

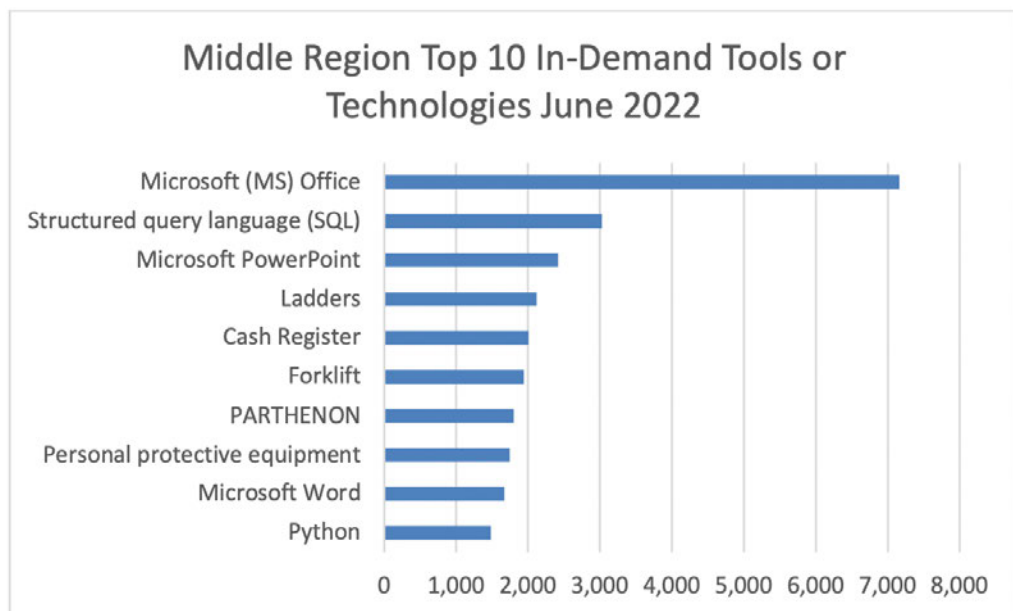
Middle TN Occupational Group	May 2015 Jobs	May 2021 Jobs	Change in Jobs	% Change in Jobs	2021 Median Hourly Earnings
Total, All Occupations	1,123,490	1,241,630	118,140	11%	18.04
Transportation and Material Moving	92,170	143,570	51,400	56%	15.08
Business and Financial Operations	48,390	66,540	18,150	38%	29.89
Construction and Extraction	34,270	46,280	12,010	35%	19.80
Healthcare Support	31,460	40,390	8,930	28%	14.29
Computer and Mathematical	23,120	29,640	6,520	28%	36.05
Community and Social Service	12,130	15,250	3,120	26%	22.52
Legal	6,830	8,570	1,740	25%	33.54
Life, Physical, and Social Science	5,640	6,940	1,300	23%	29.84
Management	72,020	88,500	16,480	23%	47.59
Healthcare Practitioners and Technical	70,080	85,160	15,080	22%	30.00
Protective Service	23,890	27,370	3,480	15%	18.75
Farming, Fishing, and Forestry	1,330	1,410	80	6%	14.33
Building and Grounds Cleaning and Maintenance	29,020	30,760	1,740	6%	14.02
Educational Instruction and Library	59,690	61,550	1,860	3%	23.45
Arts, Design, Entertainment, Sports, and Media	15,140	15,560	420	3%	21.73
Installation, Maintenance, and Repair	48,500	49,270	770	2%	22.79
Food Preparation and Serving Related	103,380	104,470	1,090	1%	11.04
Production	104,070	100,380	-3,690	-4%	18.08
Sales and Related	111,400	107,260	-4,140	-4%	14.20
Architecture and Engineering	16,690	15,960	-730	-4%	37.07
Office and Administrative Support	189,450	175,980	-13,470	-7%	18.11
Personal Care and Service	25,270	20,830	-4,440	-18%	12.89

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



Source: Jobs4tn.org Online Advertised Jobs, June 2022

Figure 24



Source: Jobs4tn.org Online Advertised Jobs, June 2022

Figure 25

Table 20: Top Employers Posting Jobs - Middle Region

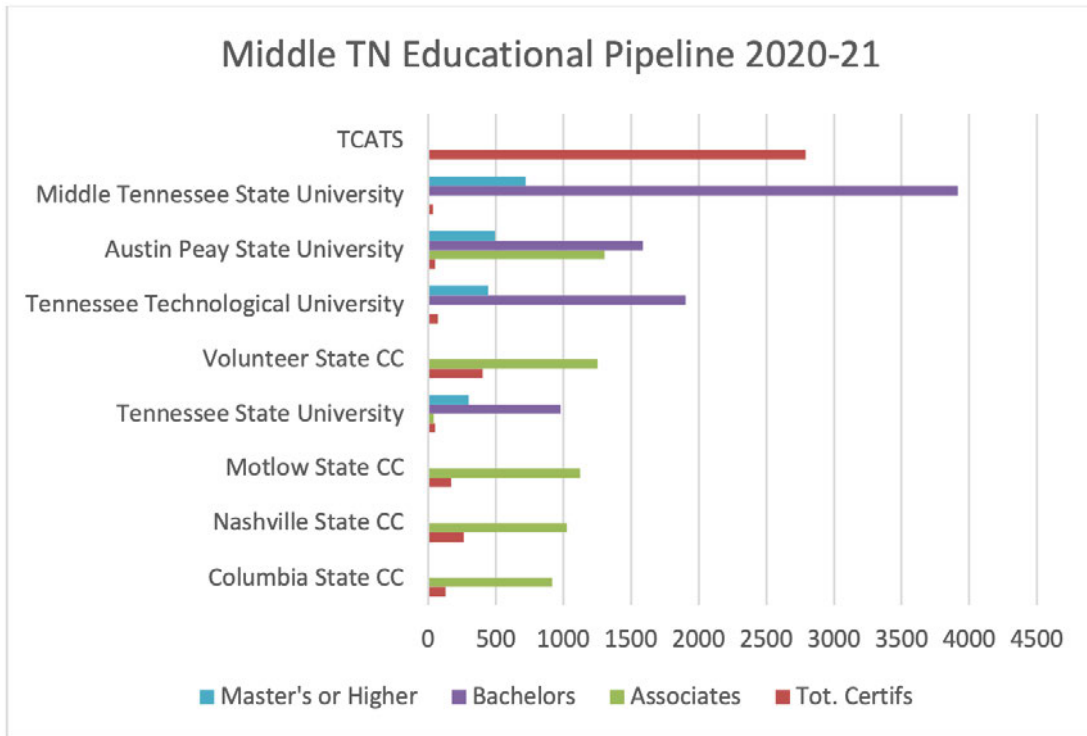
Employer Name	Job Openings
HCA Healthcare, Inc.	2,534
Vanderbilt University Medical Center	1,727
The Kroger Co.	646
LHC Group, Inc.	594
Carrols Corporation (Burger King, Popeye's)	536
Metropolitan Nashville Public Schools	446
Ascension	445
BrightSpring Health Services	439
Amazon Fulfillment	423
Community Health Systems, Inc.	423

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



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

Figure 26



Source: THEC Fact Book, Tables 2.3 and 2.4

Figure 27

The graph above lists the primary educational institutions in the Middle Region training students and current workers to fill available jobs. There are 10 Tennessee Colleges of Applied Technology in the Middle Region, producing the most diploma and certificate completers. Four community colleges and Austin Peay State University award associate degrees. Middle Tennessee State University granted nearly 4,000 bachelor's degrees in 2020-21, followed by Tennessee Technological University, Austin Peay, and Tennessee State. Information on the specific programs at each institution which provide training for occupations in demand in the Middle Region and the number of recent program completers can be found on the TDLWD dashboard [Tennessee Program Providers for Demand Occupations](#).

Middle Region Labor Force Summary

The population in the Middle Region in 2021 was estimated at 2,956,288, an increase of 5.4% over 2020, with all LWDAs experiencing population gains. Three of every four new residents of Tennessee resided in Middle Tennessee. Females were 50.7 percent of the population in the Middle Region during 2021.

Table 21: Middle Region Labor Force

	Upper Cumberland LWDA	Southern Middle LWDA	Northern Middle LWDA	Middle Region	State Total
Total Population 2020	356,092	450,826	1,996,337	2,803,255	6,772,268
Total Population 2021	366,111	473,602	2,116,575	2,956,288	6,975,218
Male Population 2021	181,970	234,828	1,039,482	1,456,280	3,420,001
Female Population 2021	184,141	238,774	1,077,093	1,500,008	3,555,217
Labor Force Participation Rate 2020 (5-Year Estimate)	54.15%	58.40%	68.68%	60.4%	58.34%
Labor Force Participation Rate 2021 (5-Year Estimate)	52.03%	58.35%	68.40%	59.6%	57.30%
Annual Average Unemployment Rate 2020 Percent	7.2%	7.7%	6.5%	7.1%	7.4%
Annual Average Unemployment Rate 2021 Percent	4.1%	4.3%	3.6%	4.0%	4.4%
Educational Attainment 25 Years and Over (2020) Some College Or Higher - Percent	42.14%	45.56%	65.42%	51.0%	51.48%
Poverty Estimate, All Ages, Percent (2020)	16.99%	13.68%	11.18%	13.9%	15.82%
Percentage of Unemployed with a Disability (2020)	14.74%	19.21%	12.51%	15.5%	16.03%
Percent of Those Not in the Labor Force with a Disability (2020)	36.42%	35.76%	26.75%	33.0%	35.03%

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

Table 22: Educational Attainment, 2020

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	1,558,496	225,884	97,824	3,692,829	718,104	186,240
High school graduate only	481,128	64,187	28,279	1,181,472	243,466	53,619
Percent high school graduate only	30.87%	28.42%	28.91%	31.99%	33.90%	28.79%
High school graduate or higher	1,398,947	201,122	64,951	3,285,872	624,634	120,456
Percent high school graduate or higher	89.76%	89.04%	66.40%	88.98%	86.98%	64.68%
Bachelor degree or higher	497,391	61,807	16,732	1,075,103	151,390	30,753
Percent bachelor degree or higher	31.91%	27.36%	17.10%	29.11%	21.08%	16.51%

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

The labor force participation rate (LFPR) in the Middle Region in 2021 was 59.6 percent, .8 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 Upper Cumberland LWDA, possibly associated with job decreases in leisure and hospitality and retail trade. The LFPR in the Northern and Southern Middle LWDA's were greater than the state rate. 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 4.0 percent, lower than the state rate.

The lowest rate of educational attainment in 2020 was in the Upper Cumberland LWDA, with 42.1 percent of the population aged 25 years or more having some college or additional education. However, the rate in the Northern Middle LWDA was 65.4 percent, 14.4 percentage points above the state rate and the highest in the Middle Region. The state and Middle Region rate were lower in 2020 than 2019. Viewing this from an equity perspective, 31.9% of the white residents in the Middle Region age 25 years or more had earned bachelor's degrees or higher, whereas Black (27.4) and Hispanic or Latino residents (17.1) had lower rates of degree awards; however, in the Middle Region all groups had higher rates of degree completion than the state rates for these population groups.

Table 23: Disability Status of Those in the Labor Force, 2020

Di	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	205,390	145,145	137,854	10,393	127,461	7,291	1075	6,216
Southern Middle LWDA	263,103	194,338	185,131	12,819	172,312	9,207	1,769	7,438
Northern Middle LWDA	1,248,515	1,000,651	958,538	57,580	900,958	42,113	5,268	36,845
Middle Region	1,717,008	1,340,134	1,281,523	80,792	1,200,731	58,611	8,112	50,499
Tennessee	4,079,574	3,083,188	2,920,333	185,847	2,734,486	162,855	24,000	138,855

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

Table 24: Disability Status of Those Not in the Labor Force, 2020

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	205,390	145,145	137,854	10,393	127,461	7,291	1075	6,216
Southern Middle LWDA	263,103	194,338	185,131	12,819	172,312	9,207	1,769	7,438
Northern Middle LWDA	1,248,515	1,000,651	958,538	57,580	900,958	42,113	5,268	36,845
Middle Region	1,717,008	1,340,134	1,281,523	80,792	1,200,731	58,611	8,112	50,499
Tennessee	4,079,574	3,083,188	2,920,333	185,847	2,734,486	162,855	24,000	138,855

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

Poverty rates increased slightly in 2020 to 15.82 percent for the state; the Middle Region rate was 13.9 percent, largely due to the low rate in the Northern Middle LWDA, 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 16.99 percent, above the state rate.

Similar to the state as a whole, about a third of those not in the labor force have a disability, with the Upper Cumberland and Southern Middle LWDAs both higher than the state rate. Youth unemployment in the Upper Cumberland LWDA was nearly two percentage points higher than the state rate and higher than the other LWDAs in the region, an area of concern.

Table 25: Youth Unemployment 2020

Area	Labor Force	Unemployment	Rate
Upper Cumberland LWDA	23,471	3,044	12.97%
Southern Middle LWDA	28,658	2,624	9.16%
Northern Middle LWDA	158,158	14,591	9.23%
Middle Region	210,287	20,259	9.63%

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

Significant Barriers to Employment

The table above 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 and parole;
- 57 percent of those with limited English- speaking ability 45 percent of those in recovery courts;
- 58 percent of the number of in-school youth experiencing homelessness.

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	1,133	418	288	1,839	4,519
Population Ages 15-19	127,351	28,346	63,114	176,854	426,381
Population Ages 20-24	138,593	25,830	22,631	187,054	445,895
Population Ages 55+	491,717	141,753	122,934	756,404	1,993,985
Number of Veterans 2020	130,400	28,680	24,422	183,510	442,405
Number Below Poverty	218,574	59,974	59,131	337,679	965,213
Number With Disability	239,777	74,827	66,114	380,718	1,031,667
Number of Single Parent Families	337,533	71,471	62,155	471,159	1,218,991
Probationers and Parolees	22,738	3,634	3,294	29,666	67,592
Community Correction	2,059	493	345	2,897	7,370
Mental Health Court Statistics (FY 2020)	41	0	0	41	80
Limited English Speaking	20,084	1,081	1,078	22,243	39,191
*Foster Care Services - Youth Aged Out	190	68	53	311	801
Clients In Recovery Courts (2022)	552	0	113	716	1,587
**In School Youth Exper. Homelessness in 2020	5,427	188	1,198	6,813	11,759
TANF 24 Months from Ending Total 2020	305	108	52	465	1,659
Prison and Jail Population Total 2020	4,615	1,774	1,926	8,315	23,200

Source: 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, 2018.

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

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

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

** The high percentage of in-school youth experiencing homelessness is primarily because no data was reported for the Shelby County schools; however, the number of homeless youth should still be a concern, as should the number of the other special populations listed above.