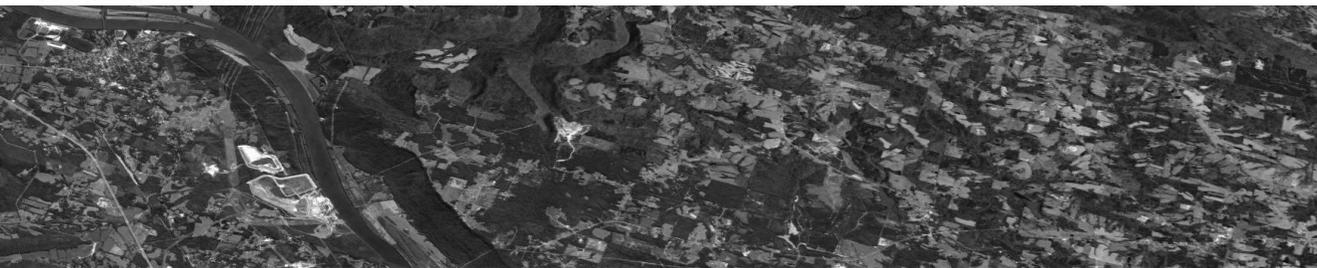


setd
SOUTHEAST TENNESSEE DEVELOPMENT

2018 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY



WHAT IS THE CEDS?

This booklet presents the Comprehensive Economic Development Strategy (CEDS) for the Southeast Tennessee-Northwest Georgia Region. The CEDS outlines a vision for the region and sets forth an ambitious plan to prepare our communities for long-term resilience and prosperity. Updated annually by the CEDS committee and staff at the Southeast Tennessee Development District, the CEDS provides an ongoing opportunity for stakeholder groups to address the challenges and opportunities facing our communities. Input from citizens, private employers, elected officials, planning commissions, service organizations, and other community representatives drives the CEDS process and helps shape its goals and strategies. Progress on the CEDS goals and recommendations will yield stronger, more resilient communities and a better quality of life for those who live and work in our region.

CONTENTS

EXECUTIVE SUMMARY PAGE 2

REGIONAL OVERVIEW PAGE 3

SWOT ANALYSIS PAGES 4-5

POPULATION SNAPSHOT PAGES 6-7

CHANGING DEMOGRAPHICS PAGES 8-9

HEALTH & THE BIG FOUR PAGES 10-11

REGION AT WORK PAGES 12-13

WORKFORCE SUCCESSION PAGES 14-15

DEGRESS FOR SUCCESS PAGES 16-17

EXPORT INDUSTRIES PAGES 18-19

REGIONAL COMPARISONS PAGES 20-21

REGIONAL CONNECTIVITY PAGES 22-23

BUILDING A REGION WHERE:

WE WANT TO LIVE PAGE 24

OTHERS WANT TO VISIT PAGE 25

BUSINESS & INDUSTRY WANT TO INVEST PAGE 26

COMMUNITIES ARE RESILIENT & READY FOR SUCCESS PAGE 27

COMMUNITY DATA PAGES 28-29

EXECUTIVE SUMMARY

The region's population has reached 800,000 and continues to grow. Most communities are seeing incomes rise and poverty rates go down. Interestingly, the total number of jobs in our region decreased by more than 2,000 from 2016 to 2017, but unemployment rates decreased. There are more annual job openings than in recent years—an indication that workers are switching jobs and seeking better opportunities as confidence in the economy grows.

More than 9,000 baby boomers turned 65 last year. This growing number of senior citizens represents a demographic sea change that will place unprecedented demand on the region's health care systems. As aging workers transition into retirement, numerous opportunities are opening for younger workers to advance in many professional fields. However, education data reveals that college graduates are not obtaining degrees in fields at rates needed to replace the aging workforce and meet projected growth, especially in technological and health care professions. Greater coordination is needed between education and industry groups to ensure students are preparing for jobs that meet the region's economic and workforce needs.

The opioid and heroin epidemic has become a top concern as it decimates families in urban and rural communities throughout the region. Efforts to control legal prescriptions are proving successful, driving desperate addicts to buy counterfeit and illegal drugs. Overdoses and fatalities are at an all-time high, and correctional institutions are overflowing with nonviolent offenders. This epidemic is expensive for health care providers, treatment centers, law enforcement, and local governments. Employers are having difficulty finding drug-free employees, leaving many high-paying jobs across the region unfilled.

Finally, the CEDS proposes several bold transportation projects that will improve connectivity and address road congestion and safety hazards throughout the region. Implementing these projects will enable the safe and efficient movement of goods and people through our region, benefitting residents and industry alike.

2018 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

**BUILDING A
REGION WHERE**

WE WANT TO LIVE

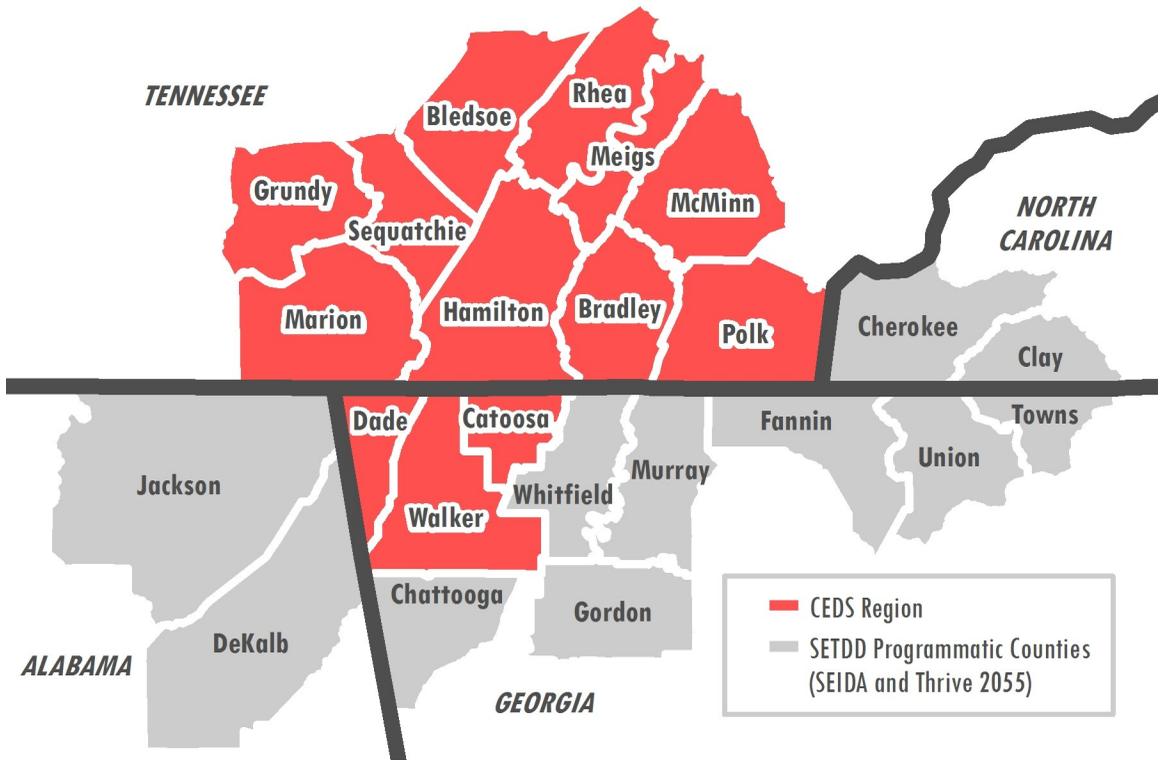
OTHERS WANT TO VISIT

BUSINESS & INDUSTRY WANT TO INVEST

COMMUNITIES ARE RESILIENT

& READY FOR SUCCESS

REGIONAL OVERVIEW



REGION AT-A-GLANCE

13 counties	156 watersheds	16 hospitals
54 towns and cities	4,700 square miles	10 airports
803,034 population	560 miles of railroads	250 K-12 schools and 65 public libraries
146,047 people ages 65+	15,000 miles of roads and highways	24 colleges and universities
370,830 labor force	970 square miles of protected lands	14 state and national parks and forests
317,608 jobs	3,100+ miles of rivers and streams	300+ national historic sites and buildings
15,500 employers	1,000+ miles of trails and greenways	2,500 acres open industrial property

SWOT ANALYSIS

STRENGTHS

- **STRONG COMMUNITIES** - People here are proud of their communities. Residents support local businesses and civic organizations, feel comfortable talking to their elected leaders, celebrate their cultural heritage, and stand behind efforts to revitalize their communities. Although some face education challenges, quality public schools are a point of pride for many communities. Churches, family values, and neighbors helping neighbors contribute to a strong and supportive social fabric. People are optimistic about the future of their community and the region.
- **NATURAL BEAUTY** - Our region is beautiful. The mountains, rivers, lakes, forests, and scenic vistas provide a stunning backdrop for everything that happens in our region. People want to move here and live here. These features also attract many visitors and outdoor enthusiasts to our communities, driving the tourism economy.
- **LOCATION, LOCATION, LOCATION** - The region is strategically located along major transportation corridors. With our rail, road, river, and air connections, companies enjoy easy access to the global marketplace. Over 20 million people live within a 180-mile drive of Chattanooga. Inside our region, many residents enjoy the quiet refuge of a rural community with all of the amenities and services of a major urban center within a 1-hour drive.
- **REGIONAL COLLABORATION** - Diverse groups and communities have repeatedly come together to tackle the challenges facing our region. Shared labor sheds, environmental resources, health care systems, and transportation corridors demand we act regionally. This collaboration and regional sense of spirit is often overlooked as one of our greatest strengths.

WEAKNESSES

- **REGIONAL CONNECTIVITY** - The region's rugged mountains, lakes, and rivers present significant challenges to regional mobility. Consequently, commuters and freight haulers must travel long distances to reach destinations. Alternate routes are few and far between during road closures and major traffic backups.
- **HEALTH CARE ACCESS** - Geographic barriers and low rural population densities present many challenges to sustainable health delivery models. Some counties face severe shortages of primary care physicians, dentists, mental health treatment, and other specialists. A lack of broadband precludes many technological solutions.
- **BROADBAND** - This "highway of the 21st century" is unavailable or unaffordable in much of the region. A lack of broadband inhibits health care delivery, education, economic development, and diminishes quality of life.
- **DRUGS AND CRIME** - Epidemic levels of opioid and heroin abuse are devastating our urban and rural communities. Drug-related deaths and crime have become commonplace. These societal ills place a heavy, expensive burden on health and emergency services and leave many employers unable to find dependable workers. Criminal records prevent rehabilitated civilians from getting jobs.
- **POOR PLANNING** - Decades of shortsighted planning decisions have resulted in sprawling communities with unmanageable utility networks, strained public services, congested roadways, and poorly connected neighborhoods. Retroactive efforts to address these problems are expensive and take years to implement.
- **HOUSING** - Vacant homes and absentee landlords result in a lack of home maintenance and neighborhood investment. Older adults on fixed incomes must choose between home maintenance or medications. Gentrification has driven low-income residents outside cities to areas where there are few social supports, low-wage service jobs, and no public transit.

OPPORTUNITIES

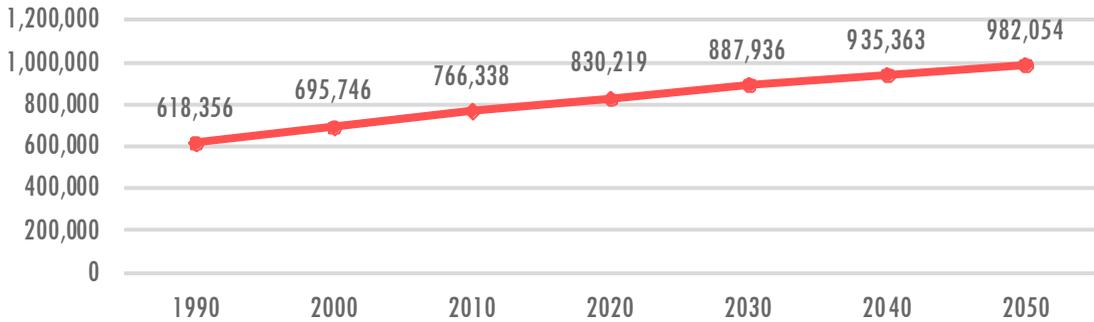
- **WORKFORCE DEVELOPMENT** - New advanced industries and international companies are creating unprecedented career opportunities for workers in our region. Education and training initiatives to help older workers obtain the proper skill sets, and encouraging students and young workers to pursue these high-paying fields, will improve residents' quality of life and standard of living. Work-based learning programs, LEAP programs, and STEM curricula will introduce and prepare students for today's careers.
- **PLACEMAKING** - Revitalization efforts that build on existing natural and cultural assets can help communities attract visitors, spur investments on Main Street, attract young families, and reverse population decline.
- **CAPACITY-BUILDING & LEADERSHIP DEVELOPMENT** - Local officials should know the basics of community & economic development. Communities also gain capacity when local stakeholders unite around a cohesive vision: this buy-in drives community development initiatives that transcend political terms or any one leader.
- **INFILL DEVELOPMENT** - Incentivizing development in areas with existing infrastructure can help rejuvenate vacant downtowns, reduce sprawl, protect farmland, conserve natural areas, and in the long run, save communities money.
- **TECHNOLOGY & INNOVATION** - Chattanooga's first-in-the-nation gigabit internet service and Innovation District are attracting tech companies and startups. Expanding broadband can grow this innovation economy, providing new jobs, business opportunities, and improved health care services.

THREATS

- **AGING INFRASTRUCTURE** - Sprawling and aging infrastructure systems are becoming increasingly expensive to maintain. Roads and bridges need repairs. Water and sewer utilities require upgrades and qualified operators. Moratoria hinder economic development, while overflows threaten the region's ecosystems and tourism industries.
- **AGING POPULATION** - Experienced workers are retiring, leaving businesses without their vast institutional knowledge. An influx of affluent retirees is driving development of natural areas and increasing housing prices in working-class neighborhoods. More and more seniors need help, but funding for services remains stagnant.
- **WORKFORCE SUCCESSION** - Employers require new talent to replace workers who are retiring, while new industries require an overall larger labor force. Many graduates are not interested in manufacturing, health care, or other fields where there is, or will be, a shortage of employees. These jobs are critical to the region's future.
- **COST OF DRUG AND OPIOID EPIDEMIC** - Overdose victims and drug offenders are devouring the budgets and resources of health departments, emergency responders, and rehabilitation facilities. Comprehensive approaches and regional partnerships are needed to overcome this modern-day public health crisis.
- **NATURAL DISASTERS** - Droughts, fires, tornadoes, flooding—the region faces many challenges beyond our control. Regional preparedness and collaboration builds resilience and can help us bounce back after a disaster.
- **RESISTANCE TO CHANGE** - Local leaders face difficult decisions and are often met with opposition by those who prefer the status quo. Bold initiatives to revitalize a community can be difficult to sell, especially if there is a financial component or the proposal would impact property rights. These tensions deter emerging leaders from stepping forward.

POPULATION SNAPSHOT

REGIONAL POPULATION GROWTH: 1990-2050

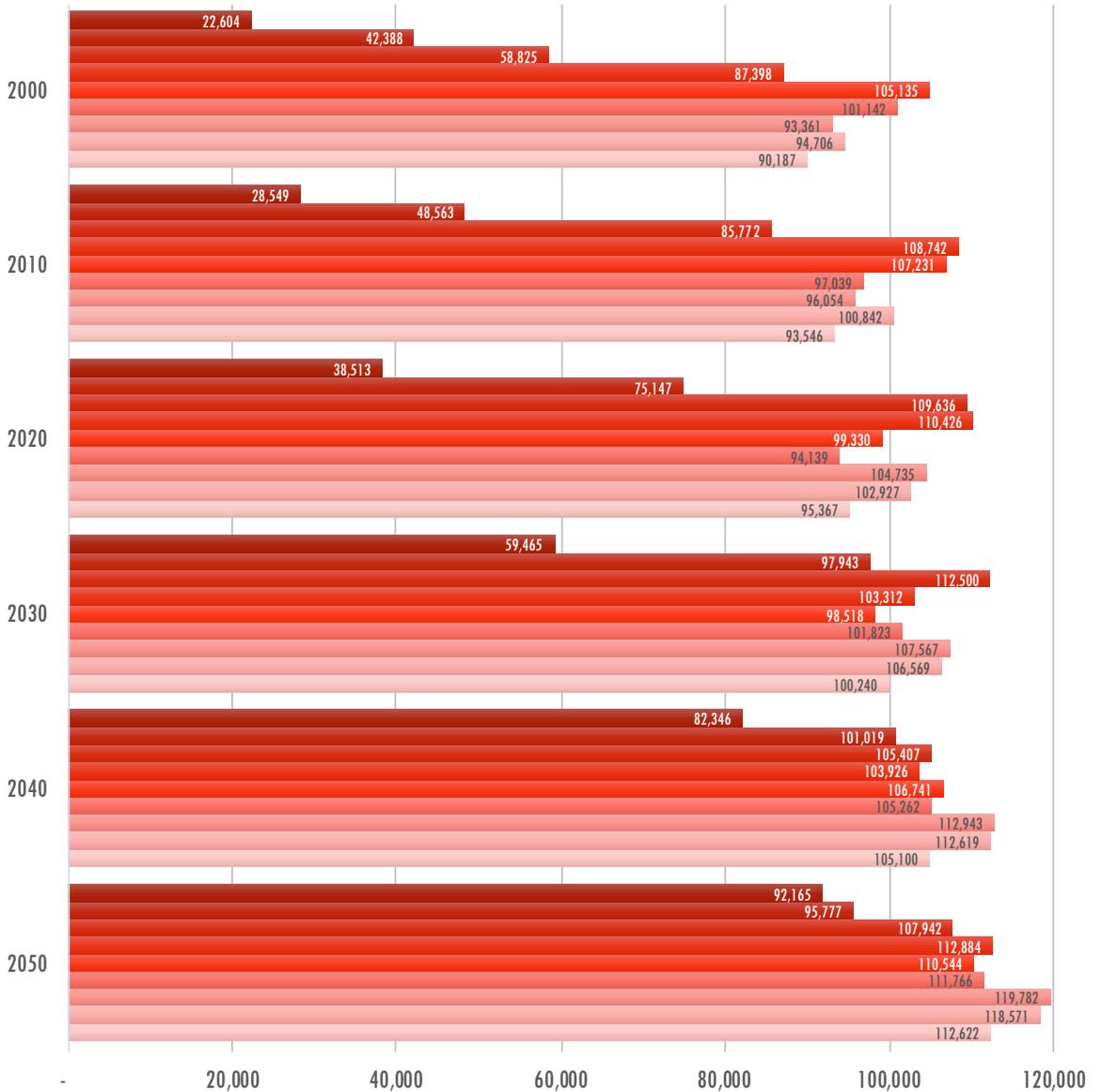


The region's population is growing. From 1990 to 2050, the region will have added approximately 364,000 people. According to data projections, the region's population will increase by an average of 16 people per day for at least the next decade. It is worth noting that some communities may undergo periods of population decline—recent census estimates suggest that Dade, Grundy, Polk, and Walker Counties are losing population. However, long-term forecasts show most counties growing in population. Some of this increase is from natural growth (i.e. babies being born), while some is from migration into the region. Chattanooga and the surrounding region is proving to be a popular retirement destination, and we will likely see an influx of affluent retirees moving here. Others move here to raise families, find a job, or live in an area gifted with many natural features and outdoor recreational opportunities.

COUNTY	1990	2000	2010	2020	2030	2040	2050
Bledsoe	9,669	12,367	12,876	13,481	14,554	15,262	15,852
Bradley	73,712	87,965	98,963	109,706	119,644	128,343	136,952
Catoosa	42,464	53,282	63,942	69,484	74,878	79,250	83,210
Dade	13,147	15,154	16,633	16,575	16,353	15,892	15,393
Grundy	13,362	14,332	13,703	14,088	14,135	13,663	13,087
Hamilton	285,536	307,896	336,463	368,666	398,076	426,544	457,189
McMinn	42,383	49,015	52,266	55,724	58,119	59,326	60,167
Marion	24,860	27,776	28,237	30,129	31,227	31,621	31,838
Meigs	8,033	11,086	11,753	12,462	13,748	14,422	14,880
Polk	13,643	16,050	16,825	17,812	18,392	18,537	18,607
Rhea	24,344	28,400	31,809	35,216	38,185	40,450	42,445
Sequatchie	8,863	11,370	14,112	16,943	19,425	21,276	22,872
Walker	58,340	61,053	68,756	69,933	71,200	70,777	69,562

Sources: U.S. Census Bureau, UT Center for Business and Economic Research, Georgia Governor's Office of Planning and Budget

REGIONAL POPULATION BY AGE GROUP: 2000-2050

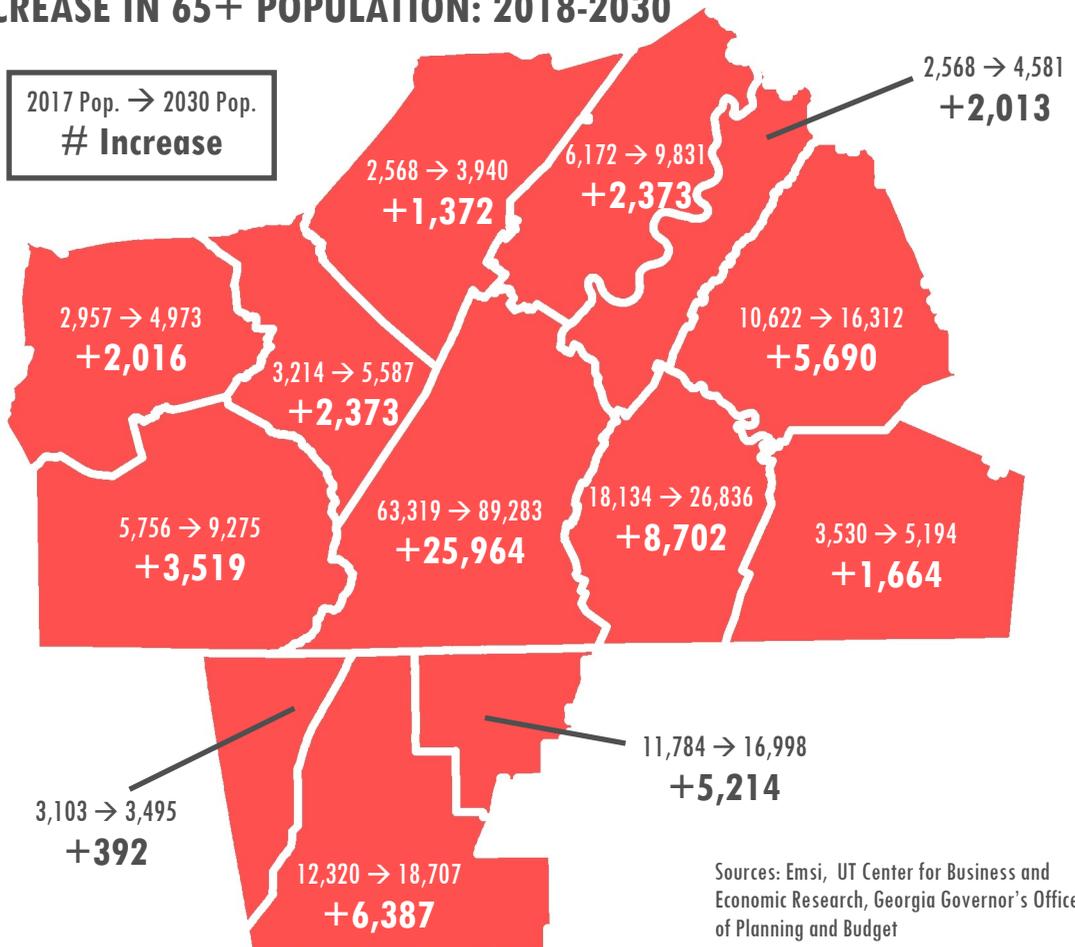


CHANGING DEMOGRAPHICS

AGING POPULATION

The population is aging, both within our region and across the United States. Today, in 2017, the senior population (ages 65+) in our region is 146,047. By the time the last baby boomer turns 65 in 2030, that number will increase by 47% to 215,013. With changes in health care, medicine, nutrition, and overall longer life expectancy, the proportion of seniors in our population will climb from historical averages of 10-15% to new levels of 25-30%, with some places seeing even higher rates. Communities that ignore this demographic sea-change will face many challenges in the coming years. Those that acknowledge, embrace, and prepare for this population shift will benefit from retirees moving to their communities, improved health care systems, greater ADA accessibility, and more vibrant and engaged senior populations. Moreover, planning on the front-end will enable older adults to age in place near their families, friends, and neighbors—and live fulfilling lives in their golden years.

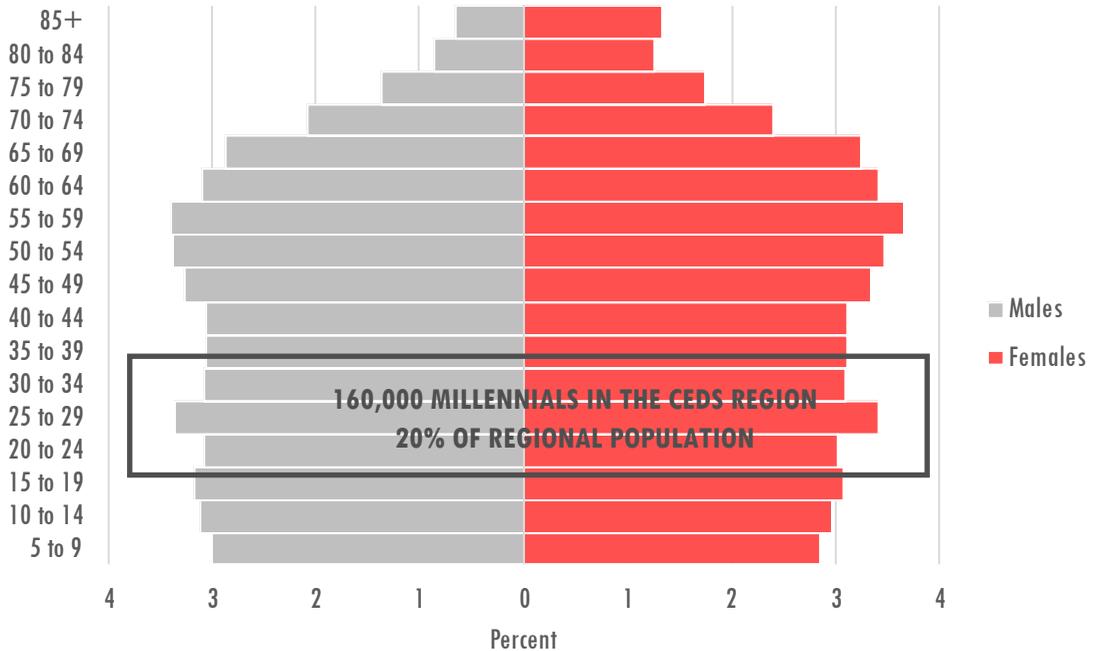
INCREASE IN 65+ POPULATION: 2018-2030



RISE OF THE MILLENNIALS

The U.S. Census Bureau defines Millennials as those born between 1982 and 2000. The 83.1 million individuals in this age group—17 to 35 years old as of 2017—now outnumber the 75.4 million Baby Boomers in the United States. By 2020, Millennials are expected to make up approximately half of the U.S. workforce.

POPULATION PYRAMID FOR CEDS REGION: 2017

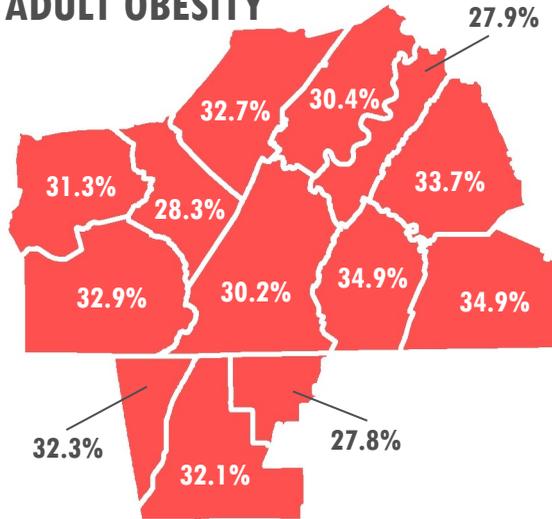


From a social and economic standpoint, today's young adults differ from previous generations in several ways. Whereas marriage and parenthood were once defining markers of adulthood, Millennials are more likely to view educational and economic accomplishments as adult milestones. They are getting married and having children later than their parents. According to the Pew Research Center, 4 in 10 Millennials have a bachelor's degree—higher than any other age group. However, the Great Recession has created some lasting economic impacts on Millennials. One in three still lives at home. From 1975 to 2016, the proportion of young men with incomes less than \$30,000 increased from 25% to 41%. During this same time, the share of young women who were homemakers fell from 43% to 14%. Approximately 2.2 million 25 to 34-year-olds live with their parents and do not work or attend school. Having come of with the internet and computers, Millennials are considered tech-savvy and digitally connected. In the workplace, Millennials place an emphasis on producing meaningful work, seek opportunities for creative outlet, and desire immediate feedback. Many prefer to work in team-oriented environments. Workplace dynamics—even the physical space—will likely evolve as Millennials increase their presence in the workplace and advance in their careers.

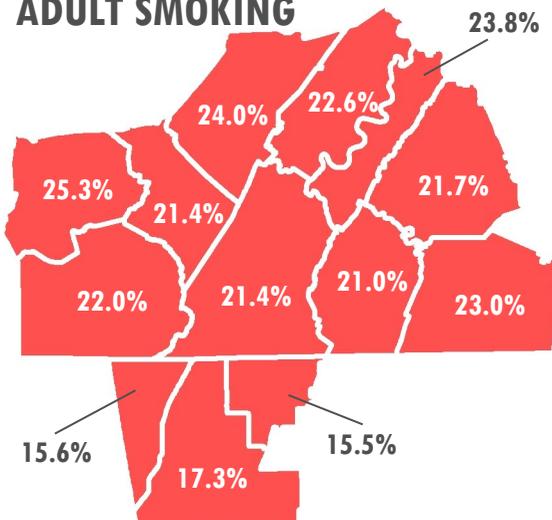
HEALTH & THE BIG FOUR

For a region to thrive, its people must be healthy. A healthy population has fewer chronic diseases, enjoys lower health care costs, misses fewer days of work, and helps build a more engaged and socially connected community. The Tennessee Department of Health has identified the “**Big Four**”—excessive caloric intake, physical inactivity, tobacco and nicotine addiction, and drug and opioid abuse—as primary causes of the state’s health crisis. Together, the Big Four contribute to all 10 of the top 10 leading causes of death in Tennessee.

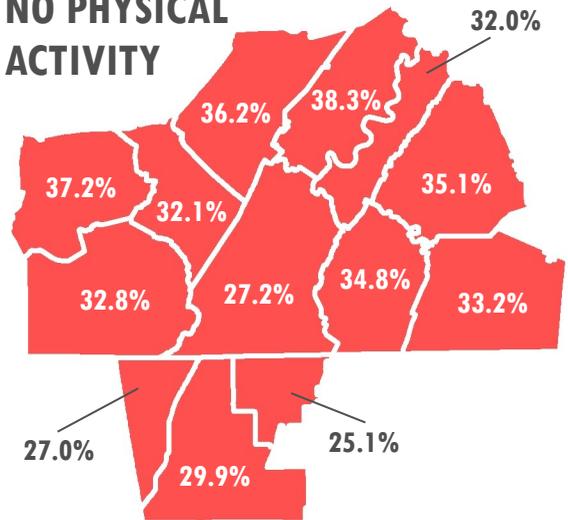
ADULT OBESITY



ADULT SMOKING



NO PHYSICAL ACTIVITY



Sources: U-Wisconsin 2017 County Health Rankings

DRUG & OPIOID ABUSE

Abuse of prescription medications and other substances is creating unprecedented levels of addiction and dependency throughout our region and across the state. The percent of admissions to publicly funded treatment centers due to opioids has tripled in Tennessee over the past 10 years. According to the Tennessee Department of Mental Health and Substance Abuse Services (TDMHSAS), 190,000 Tennesseans used pain relievers non-medically in the past year. Of these, 58,000 were young adults ages 18-25. In total, Tennessee experienced 1,631 opioid deaths in 2016.

OPIOID ABUSE IN SOUTHEAST TENNESSEE: 2016 TN DEPT. OF HEALTH DATA

County	Total Opioid Prescriptions	Rx Per Person	Nonfatal Overdoses	Fatal Overdoses
Bledsoe	22,155	1.51	31	3
Bradley	120,956	1.16	351	16
Grundy	26,625	1.99	96	3
Hamilton	388,506	1.09	883	69
McMinn	84,505	1.60	168	13
Marion	55,132	1.94	82	4
Meigs	21,478	1.79	40	8
Polk	28,228	1.64	49	5
Rhea	55,317	1.71	92	5
Sequatchie	24,173	1.62	38	3

Sources: TN Department of Health Office of Informatics & Analytics

Counterfeit prescription drugs, which are smuggled into the United States and sold illegally, look identical to popular name-brand prescription drugs, but are often dangerous mixes of illicit narcotics and chemical compounds such as fentanyl and carfentanil. Heroin use is also on the rise: statewide in 2009, there were 18 deaths from heroin overdoses; in 2016, there were 260. This drug and opioid crisis is decimating families and communities. Overdoses and treatment costs are also ballooning budgets for local governments, health departments, and law enforcement agencies. Employers cannot hire addicts to operate machinery or vehicles, creating worker shortages. It is essential for the region to recognize this public health crisis and support state and national efforts to reduce opioid abuse.

Hepatitis & HIV Risk

In 2015, Scott County, Indiana—a rural community of 24,000 with a 97.6% white population—experienced an HIV and Hepatitis C outbreak spurred by sharing dirty needles to inject opioids. Nearly 200 people contracted the HIV virus, with more than 20 new cases being diagnosed every week during the height of the outbreak. The following year, the Center for Disease Control released a report that identified 220 counties at risk for a similar outbreak based on factors including poverty, rural setting, previous drug abuse patterns, and other factors. Local at-risk communities identified by CDC include Bledsoe, Cherokee, Clay, Fannin, Graham, Meigs, Polk, Rhea, and Towns Counties.

REGION AT WORK

Even with the decline of coal, steelworks, and other heavy industries, the region's manufacturing labor force, ideal climate, natural resources, and rail and road connections have enabled our economy to remain strong compared to many industrial communities in the Northeast and Midwest. Manufacturing constitutes a significant part of the region's total economy and drives most of export economy (see page 18). However, today other sectors actually employ greater numbers of workers, as evidenced by the table below.

TOP 10 OCCUPATIONS BY TOTAL EMPLOYMENT

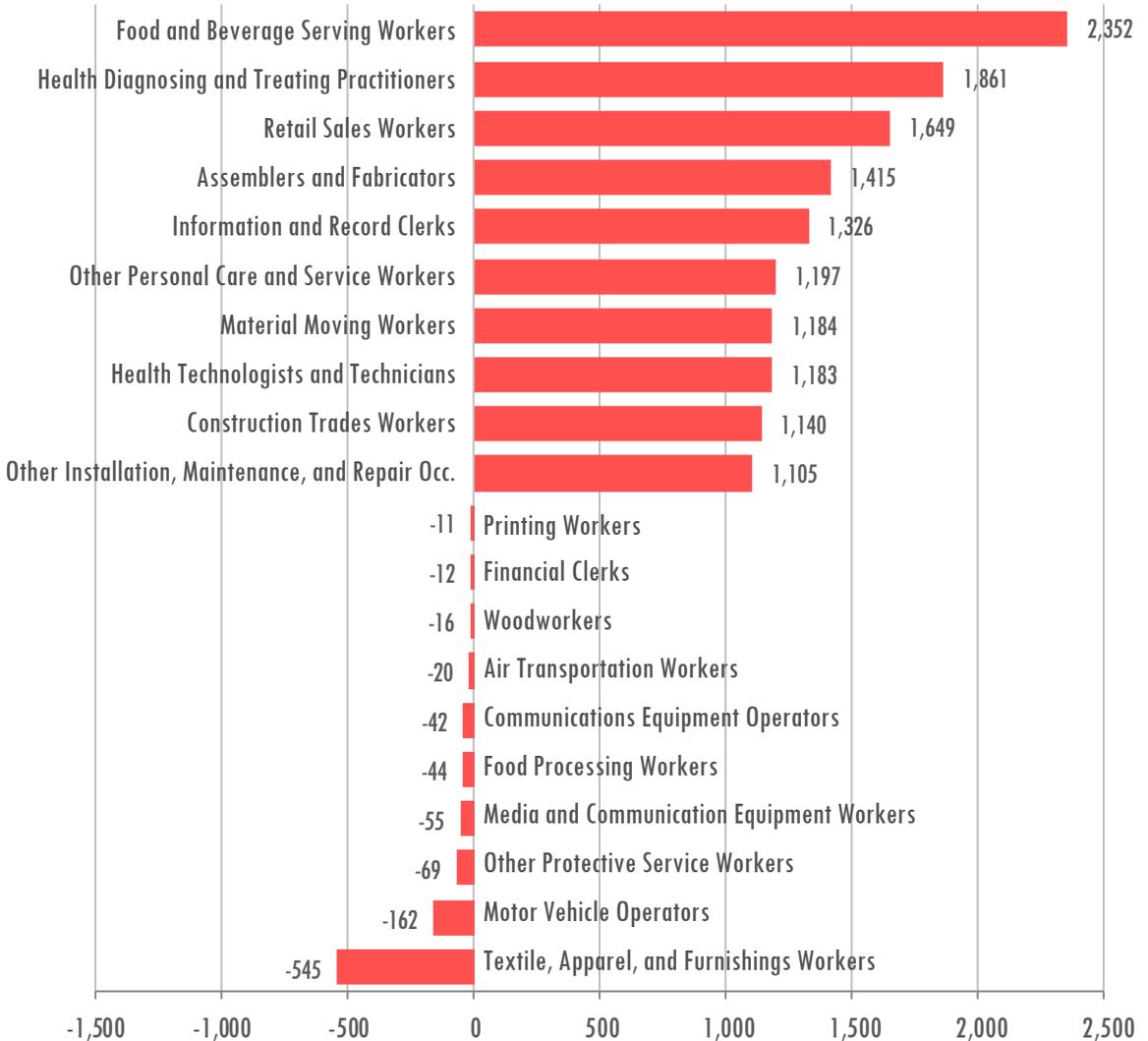
RANK	OCCUPATION	2017 JOBS	MEDIAN WAGE	LQ
1	Retail Sales Workers	20,398	\$11.65/hr	1.05
2	Food and Beverage Serving Workers (incl. fast food)	16,932	\$9.08/hr	1.02
3	Material Moving Workers (warehousing, hand movers, etc.)	14,026	\$13.38/hr	1.36
4	Information and Record Clerks	13,867	\$14.45/hr	1.10
5	Motor Vehicle Operators (incl. truck drivers)	12,446	\$16.43/hr	1.41
6	Health Diagnosing and Treating Practitioners (doctors, RNs)	11,875	\$39.59/hr	1.02
7	Assemblers and Fabricators	10,708	\$15.06/hr	2.67
8	School teachers (preschool, primary, secondary, special ed.)	9,515	\$23.49/hr	1.08
9	Other Production Occupations	9,191	\$15.12/hr	1.59
10	Material Recording, Scheduling, Dispatching, and Distributing Workers	8,933	\$15.56/hr	0.98

Based on 3-digit Standard Occupation Codes. Source: Emsi, Q4 2017

The largest employment sectors are not necessarily those that provide the greatest degree of economic specialization or economic output. Instead, they are often jobs that provide the day-to-day goods and services used and consumed by the region's population. In our region, retail sales and foodservice provide the greatest numbers of jobs, followed by warehousing, distribution, and logistics workers. Some occupations require advanced training and education, but many are low-skill and fairly low-wage, often without benefits. Health treatment practitioners reported the highest median wages of the top 10 sectors at \$39.59 per hour, followed by school teachers at \$23.49.

Although many rural areas face health challenges, the location quotient for health treatment practitioners (1.02) shows the number of doctors, pharmacists, and other health professionals across our region is proportionately equal to the national average. As the figure on the opposite page illustrates, health care professions will see high growth in our region over the next 10 years—largely just to keep up with the needs of a growing and aging population.

TOP 10 OCCUPATIONS FOR PROJECTED JOB GAINS & LOSSES: 2017-2027

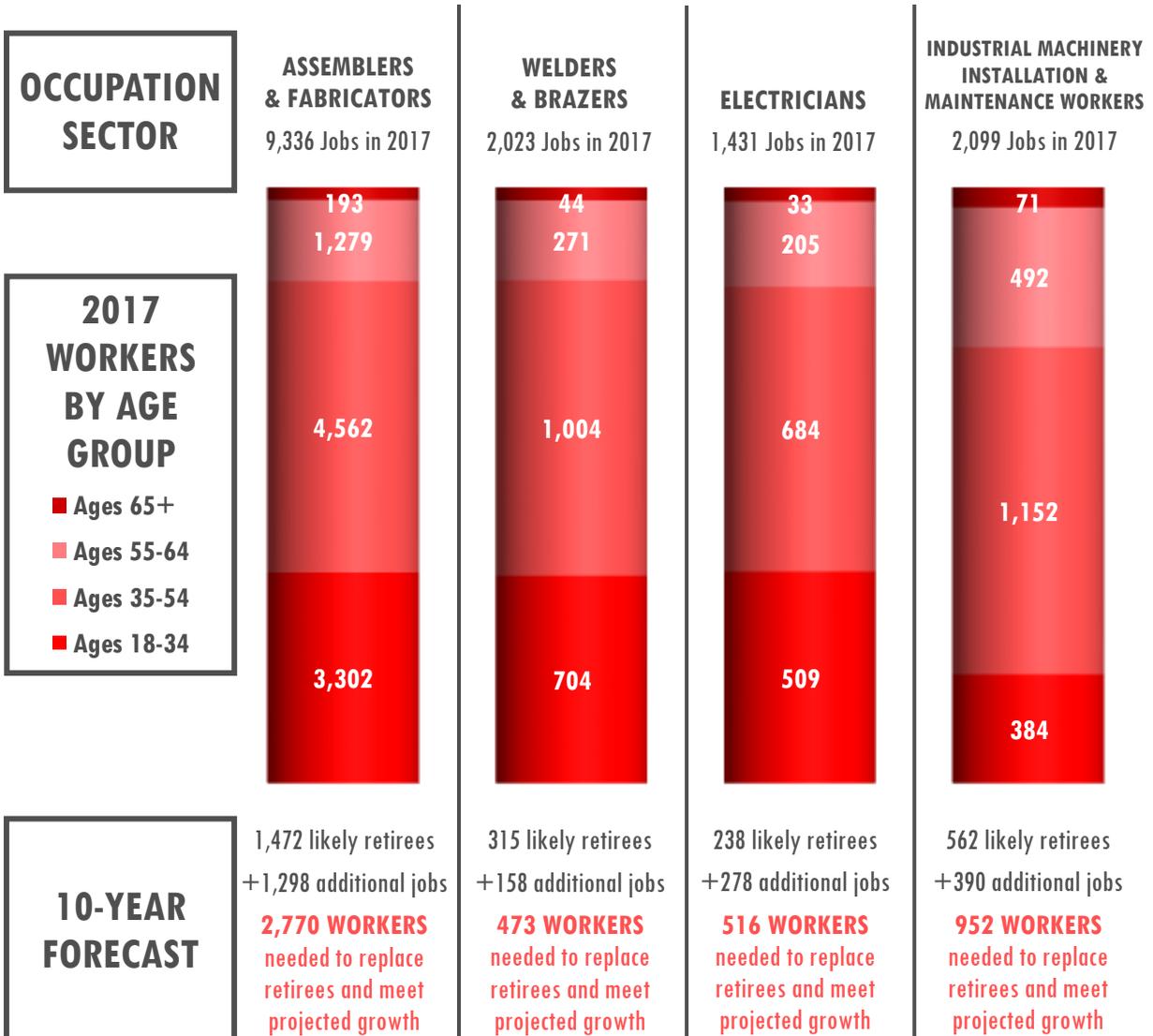


Based on 4-digit NAICS Codes. Source: Emsi, Q4 2017

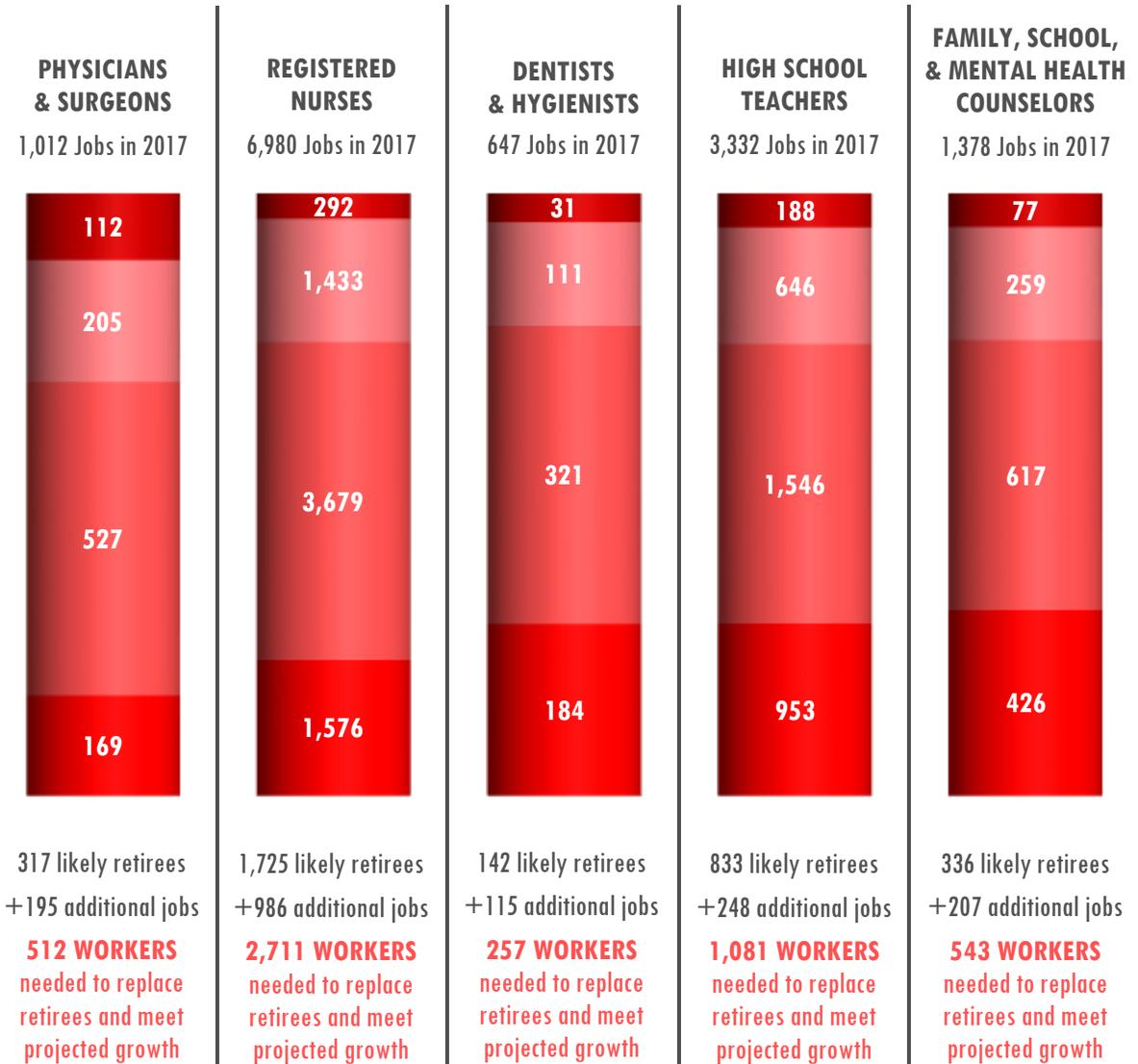
A region can experience growth or decline in an industry due to changes in technology and fluctuations in the national and international economy, among other factors. The table above highlights the top 10 sectors that are projected to either grow or decline based on current trends and assumptions. The data forecasts growth in health care, service industry, and manufacturing occupations, with declines in textiles and driver-based transportation.

WORKFORCE SUCCESSION

As the workforce ages and many baby boomers retire, does the region have workers to fill these positions? As of 2017, our region's workforce included over 50,000 people ages 55-64 and another 16,000 over age 65. Worker shortages can overburden current employees, result in lost business contracts, and potentially force some companies to leave the region. Our educational institutions, economic and workforce development programs, employers, and key stakeholders should direct their efforts to ensure we are meeting the region's workforce needs.



About this chart: The columns present employment data for various occupations in the CEDS region. The current number of jobs in a sector is provided at the top of the column. The bar below breaks these workers down by age group. At the bottom of each column is an estimate of likely retirees over 10 years; for the purposes of this chart, most employees in the “Ages 55-64” and “Ages 65+” groups are presumed to retire at 65 or soon thereafter. The anticipated number of new jobs based on current growth trends is also listed. Adding the number of new jobs and retirees produces an estimate of the number of workers required to sustain each sector over the next 10 years.



Based on 4-digit Standard Occupation Codes. Source: Emsi, Q4 2017

DEGREES FOR SUCCESS

Many professions require a college degree. As students look to their professional futures, which occupations provide the greatest opportunities for employment? High school graduates today are often encouraged to pursue degrees in the STEM fields; as the chart below illustrates, these are high-paying jobs with multiple openings each year. The region's economic future depends on educational institutions producing qualified workers with adaptive skill sets. Students should be encouraged to enroll in degree programs that guarantee them high-paying work and opportunities for career advancement in the CEDS region.

OCCUPATIONS REQUIRING A COLLEGE DEGREE

OCCUPATION	JOBS IN 2017	ANNUAL OPENINGS	MEDIAN WAGE
K-12 School Teachers, Including Special Ed.	8,436	687	\$23.50/hr
Registered Nurses	6,980	477	\$25.97/hr
Accountants and Auditors	1,589	173	\$27.29/hr
Pharmacists	693	35	\$58.25/hr
Educational & Vocational Guidance Counselors	545	64	\$21.90/hr
Paralegals and Legal Assistants	441	46	\$17.55/hr
Physical Therapist Assistants	374	53	\$25.55/hr
Marketing Managers	320	32	\$37.70/hr
STEM OCCUPATIONS			
Industrial Engineers	1,036	82	\$38.68/hr
Computer Systems Analysts	926	80	\$38.57/hr
Software/Application Developers	715	63	\$37.30/hr
Computer Programmers	596	37	\$36.66/hr
Mechanical Engineering Technicians	242	23	\$24.01/hr
Information Security Analysts	232	19	\$40.63/hr
Mechanical Drafters	205	18	\$24.03/hr
Chemists	120	14	\$30.29/hr

Based on 5-digit Standard Occupation Codes. Source: Emsi, Q4 2017

In 2016, colleges and universities in the CEES region awarded 1,817 associate's and 3,956 bachelor's degrees. The tables below provide a breakdown of the completions in each academic program.

REGIONAL DEGREE COMPLETIONS

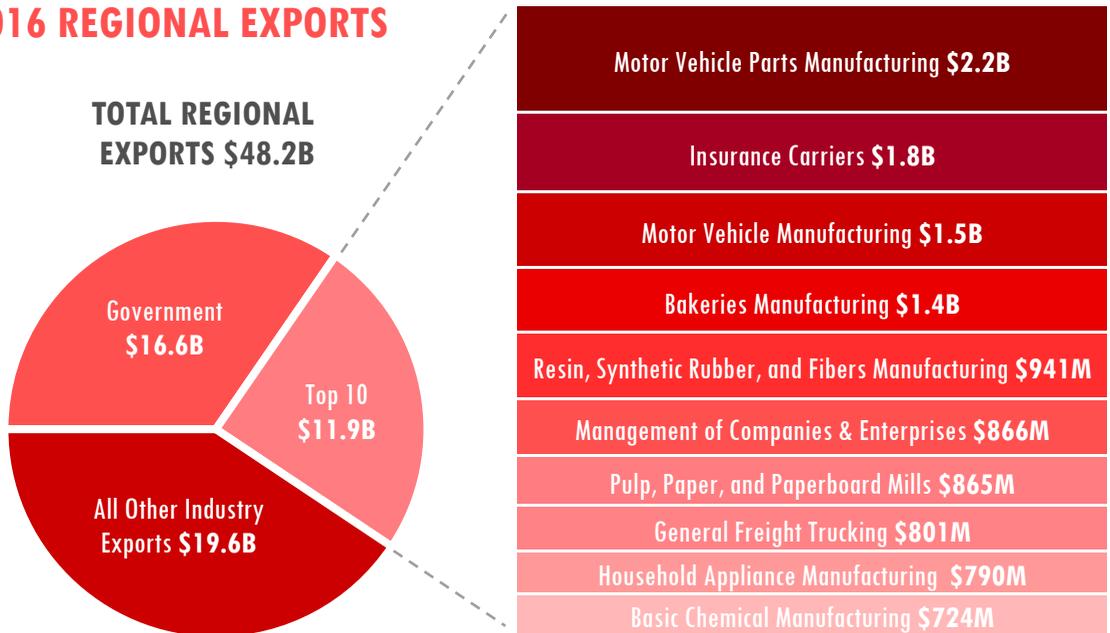
TOP 10 BACHELOR'S DEGREE PROGRAMS	2016 COMPLETIONS
Business Administration and Management	695
Psychology	285
Nursing	282
Kinesiology and Exercise Science	249
Biology/Biological Sciences	196
Early Childhood Education and Teaching	140
English Language and Literature	110
Elementary Education and Teaching	98
Communications	96
Criminal Justice/Law Enforcement Administration	88
TOP 10 ASSOCIATE'S DEGREE PROGRAMS	2016 COMPLETIONS
Liberal Studies	673
Nursing	359
Business	103
Engineering Technology	97
Medical/Clinical Assistant	56
Dental Assistant	46
Health Professions and Related Clinical Sciences	37
Computer and Information Sciences	33
Commercial and Advertising Art	30
Administrative Assistant and Secretarial Science	29

Based on IPEDS database published by US Dept. of Education National Center for Educational Statistics. Source: Emsi, Q4 2017

EXPORT INDUSTRIES

One way to analyze an economy is by looking at its exports. The figure below identifies the top export industries in the CEDS region for 2016. The goods that these industries produce—carpet, flooring, automotive parts, industrial components, and more—are not all consumed or needed by the local population. Rather, they are exported to other regions and around the world, generating income for our region.

2016 REGIONAL EXPORTS



Based on 4-digit NAICS CodesSource: Emsi, Q4 2017

This export data reveals that manufacturing continues to constitute a major portion of Southeast Tennessee and Northwest Georgia’s economy. Insurance, management, and trucking also provided major contributions to our regional exports. Combined, the top 10 non-governmental export industries generated nearly \$12 billion in exports and provided 33,340 jobs throughout our region.

A significant portion of the CEDS region’s exports fall into the government category. This includes spending on transportation and public works projects, housing assistance, grants, and other government programs. Power sales by TVA and other public utilities are also considered government exports.

What is a Location Quotient?

A location quotient (LQ) is a numerical value representing the proportion of local workers in a given industry versus the nation as a whole. LQs help economists understand how a region's economy is different or similar to the economy in other areas. Scores greater than 1.00 indicate that an industry employs local workers at a rate higher than the national average. Often, the goods and services these industries produce are exported outside the region. The table below shows high LQ scores for occupations in textiles, manufacturing, transportation, and logistics.

TOP 10 INDUSTRIES BY LOCATION QUOTIENT

RANK	INDUSTRY	JOBS	2016 EXPORTS	LQ
1	Apparel Knitting Mills	670	\$73M	25.16
2	Household Appliance Manufacturing	3,486	\$790M	24.91
3	Fiber, Yarn, and Thread Mills	1,317	\$300M	20.45
4	Fabric Mills	1,506	\$354M	12.63
5	Specialized Freight Trucking	5,768	\$712M	5.76
6	Resin, Synthetic Rubber, and Fibers Manufacturing	1,191	\$941M	5.75
7	Bakeries Manufacturing	3,384	\$1,435M	4.95
8	Sugar and Confectionery Product Manufacturing	789	\$3514M	4.80
9	Household and Institutional Furniture and Kitchen Cabinet Mfg.	2,612	\$430M	4.77
10	Textile and Fabric Finishing and Coating Mills	326	\$71M	4.75

Based on 4-digit NAICS Codes. Source: Emsi, Q4 2017

The Risks of Being Too Specialized

When an economy and its major employment industries become too concentrated in a small number of sectors, it makes the region susceptible to fluctuations in the national and international economy as well as changing technologies and market trends. A workforce with a limited skill set also hurts efforts to recruit new businesses. While specialization and economies of scale can make a region more competitive for a particular industry, it is critical that the region diversify its economy and develop communities and workforces that will accommodate new and emerging industries and trends. Attracting a broader class of industries and training workers with new skills will help with economic diversification and make our region more resilient in the long run.

REGIONAL COMPARISONS

The chart below identifies economic clusters in which the region has high concentrations of employment and compares these with other areas. The CEDS region tracks closely with Greenville, SC in several industry groups.

INDUSTRY CLUSTER	AUTOMOTIVE	PLASTICS	TEXTILE MFG	TRANS. & LOGISTICS	FURNITURE
 CEDS REGION	7,817 Jobs 4.42 LQ \$1.1B GRP	2,886 Jobs 2.50 LQ \$393M GRP	4,703 Jobs 9.25 LQ \$380M GRP	10,677 Jobs 2.42 LQ \$933M GRP	2,873 Jobs 3.06 LQ \$143M GRP
 GREENVILLE-ANDERSON-MAULDIN, SC	7,475 Jobs 3.13 LQ \$957M GRP	5,623 Jobs 3.63 LQ \$814M GRP	5,765 Jobs 7.92 LQ \$518M GRP	2,591 Jobs 0.33 LQ \$300M GRP	874 Jobs 0.94 LQ \$49M GRP
 BIRMINGHAM-HOOVER, AL	7,155 Jobs 2.19 LQ \$923M GRP	1,773 Jobs 0.94 LQ \$149M GRP	124 Jobs 0.09 LQ \$12M GRP	5,891 Jobs 1.20 LQ \$745M GRP	634 Jobs 0.38 LQ \$33M GRP
 LOUISVILLE-JEFFERSON COUNTY, KY-IN	20,024 Jobs 5.23 LQ \$8.3B GRP	5,230 Jobs 2.09 LQ \$544M GRP	236 Jobs 0.34 LQ \$10M GRP	8,377 Jobs 1.15 LQ \$861M GRP	2,484 Jobs 1.55 LQ \$148M GRP
 HUNTSVILLE, AL	3,290 Jobs 2.39 LQ \$464M GRP	1,105 Jobs 1.24 LQ \$93M GRP	131 Jobs 0.59 LQ \$8M GRP	1,222 Jobs 0.50 LQ \$152M GRP	1,143 Jobs 2.76 LQ \$96M GRP
 ROANOKE, VA	948 Jobs 1.03 LQ \$96M GRP	878 Jobs 1.50 LQ \$69M GRP	117 Jobs 0.12 LQ \$9M GRP	1,158 Jobs 0.62 LQ \$238 GRP	642 Jobs 1.54 LQ \$32M GRP

Based on Industry Groups as defined by Harvard Business School. Source: Emsi, Q4 2017.

How does the 10-county Southeast Tennessee Development District region stack up against other economic development districts across the United States? **StatsAmerica**, an online resource developed by the U.S. Economic Development administration, ranks regions using a variety of criteria and sources such as innovation, foreign direct investments, venture capital, GDP, and more.

**OUT OF 384
ECONOMIC DEVELOPMENT DISTRICTS
IN THE UNITED STATES,
THE SOUTHEAST TENNESSEE REGION RANKS...**

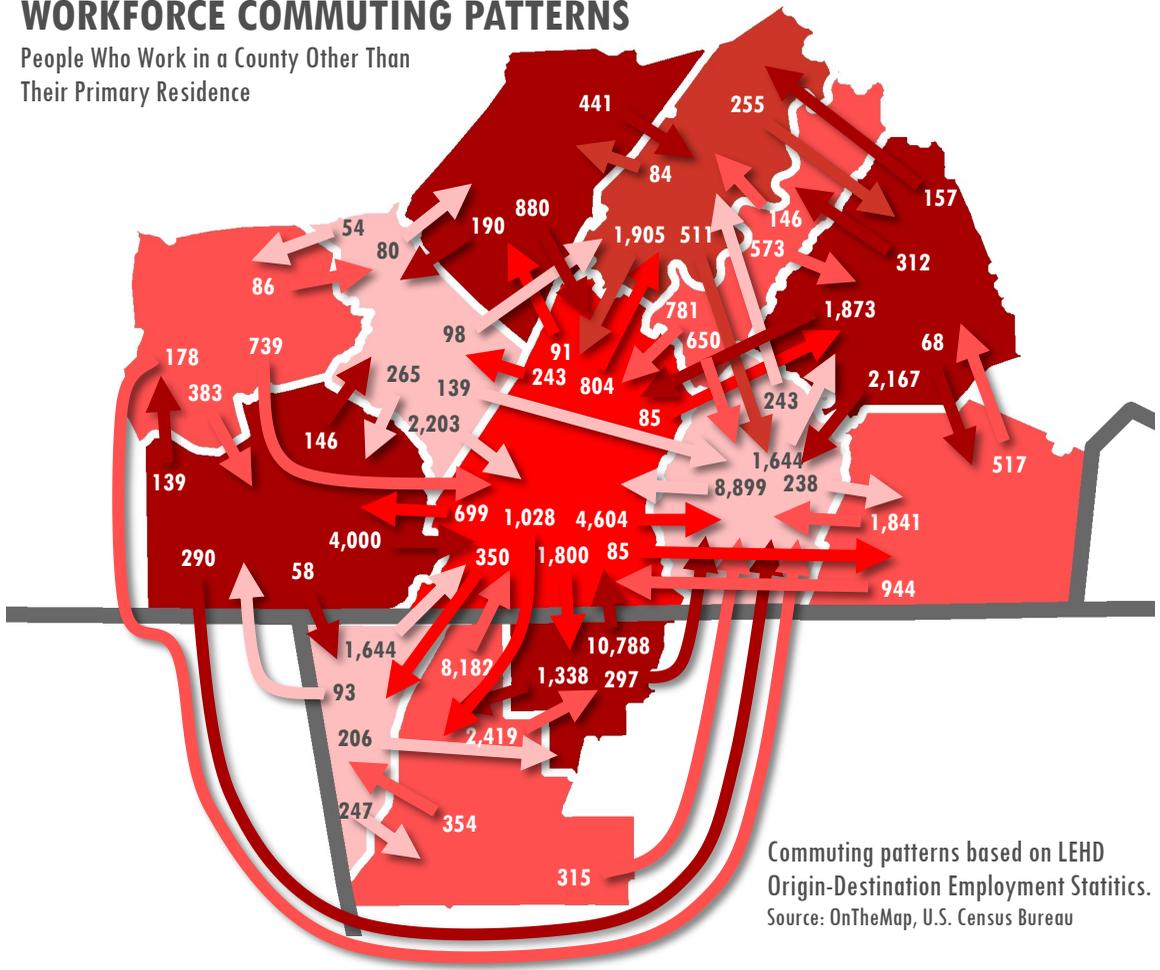
<p>12TH FOREIGN DIRECT INVESTMENT EMPLOYMENT INDEX</p> <p>Jobs created by FDI investments per 1,000 working-age adults</p>	<p>20TH RESIDENTIAL HIGH-SPEED BROADBAND CONNECTION DENSITY</p> <p>Fixed high-speed connections per 1,000 households</p>	<p>116TH REGIONAL INNOVATION INDEX</p> <p>Index of 50+ inputs and outputs to measure regional innovation capacity and outcomes</p>
<p>129TH HIGH-TECH VENTURE CAPITAL FUNDING</p> <p>Venture capital funding for firms in high-tech, averaged over 10 years</p>	<p>130TH NET DOMESTIC MIGRATION</p> <p>Average net migration rate into region from 2009 to present</p>	<p>132ND GDP PER WORKER</p> <p>Region's current-dollar GDP divided by number of employees</p>
<p>187TH ECONOMIC CLUSTER STRENGTH</p> <p>Concentration of employment across a diverse range of industries</p>	<p>254TH REGIONAL POVERTY RATE</p> <p>Proportion of region's population that lives below the poverty threshold</p>	<p>326TH REGIONAL INCOME INEQUALITY</p> <p>Calculated based on the region's mean vs. median household incomes</p>

REGIONAL CONNECTIVITY

Transportation and mobility are major concerns for the region. Our economy depends on rapid, safe, and efficient movement of people, goods, and services—a necessity which is threatened by the region’s geographic hurdles, congested bottlenecks, and outdated infrastructure. Our region ranks in the top 10 nationally for volume of freight traffic, 80% of which is pass-through and does not stop in our region. Less than 1% of the region’s population utilizes public transportation. Gentrification is displacing low-income residents with few transportation options. Biking carries significant safety risks in many places.

WORKFORCE COMMUTING PATTERNS

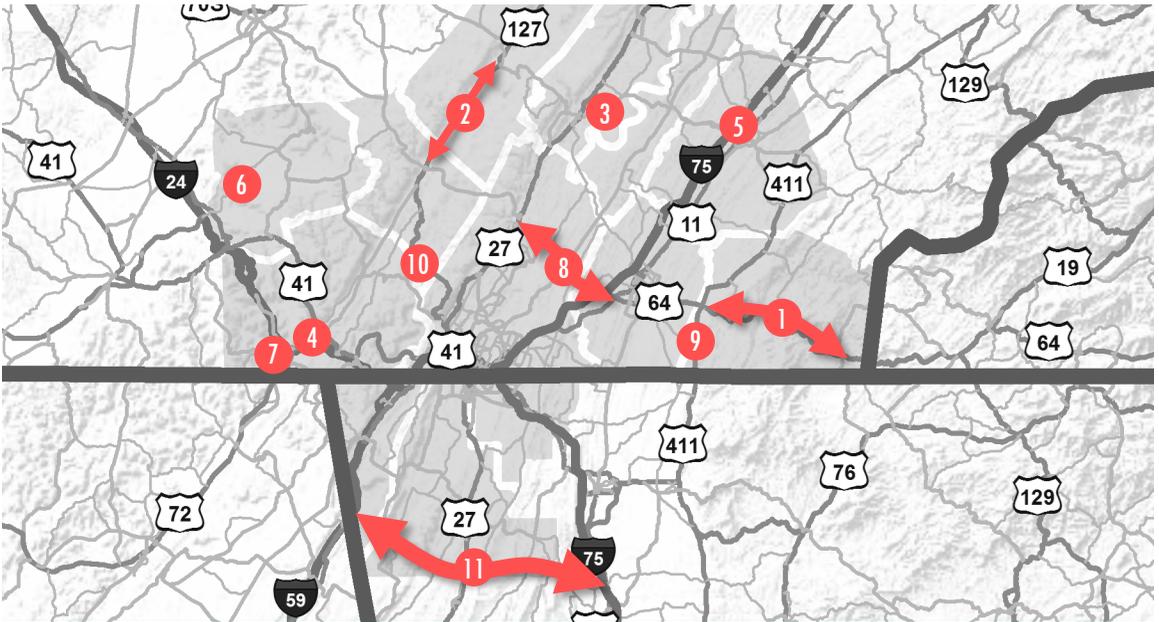
People Who Work in a County Other Than Their Primary Residence



Commuting patterns reveal a region that is on the move: over 146,000 people cross a county line on their way to work. In addition, nearly 40,000 Georgians work in Tennessee, while almost 16,000 Volunteers work in the Peach State.

PRIORITY TRANSPORTATION PROJECTS

The Southeast Tennessee RPO and region’s mayors have identified the following projects as priority regional transportation needs. These projects will improve safety, reduce congestion, and increase regional connectivity.



NO.	PROJECT	PHASE	FUNDED?
1	Corridor K — Hwy 64/Ocoee Gorge Bypass	Env. Review	Part
2	Widening U.S. 127 from U.S. 111 to Pikeville (Super 2)	Right-of-Way	Yes
3	Widening S.R. 30 from Dayton to TN River Bridge (Super 2)	Right-of-Way	Yes
4	Improving U.S. 64 between Jasper and Kimball	Right-of-Way	Yes
5	I-75 Interchange Improvements at Exits 49 and 52	Right-of-Way	Yes
6	Improving S.R. 50 (Pelham Road)	Prelim. Eng.	Yes
7	Improving S.R. 156 (S. Pittsburg Mountain Road)	Prelim. Eng.	Yes
8	Connector between S.R. 111 and I-75 at Exit 20	Planning	No
9	Widening U.S. 411 between U.S. 64 and TN-GA State Line	Planning	No
10	Big Fork Road Connector between S.R. 27 and U.S. 127	Planning	No
11	Chattanooga Bypass/Connector between I-59 and I-75	Planning	No

BUILDING A REGION WHERE

WE WANT TO LIVE

1. COMMUNITY REVITALIZATION—Our region has experienced major transformations over the years. Some towns are distressed with empty main streets. Others grew rapidly with little planning or foresight given to the rampant development. Turning our communities around can spur new investment and result in more quality growth.

- Clean up and redevelop contaminated brownfield sites, vacant properties, and blighted areas so they are available for infill developments featuring mixed commercial and residential uses.
- Convert underutilized downtown boulevards into attractive Main Streets with landscaping, bike lanes, sidewalks, canopied storefronts, and attractive public spaces.
- Create outdoor public spaces such as parks, plazas, and pavilions that can support a variety of activities such as farmer's markets, outdoor concerts and movies, and other community events.
- Empower planning commissions to pursue a long-term and holistic approach to developing the built environment. Regulations should be aligned to meet the shared vision for the community.

2. HOUSING DEVELOPMENT AND IMPROVEMENT—Much of the region's housing stock is old and deteriorated. Low-income families and seniors on fixed incomes cannot afford essential home maintenance or repairs. High concentrations of rental properties combined with absentee landlords result in little or no investment in many properties. Safe and adequate housing is essential for family stability, educational attainment, and good health.

- Perform repairs and improvements to homes in disrepair with a priority on low-income, disabled, and elderly households. Educate individuals how to maintain their renovated homes.
- Support ADA accessibility standards in residential dwellings, and complete home modifications that enable seniors to stay in their current homes.
- Develop affordable housing options for senior citizens with varying levels of community supports.
- Update development codes to accommodate a diversity of housing styles and densities. Effective policies can support mixed uses and contemporary housing trends while protecting existing neighborhoods.
- Modify zoning and subdivision regulations to promote entry-level workforce housing.

3. STRONG COMMUNITY INSTITUTIONS AND QUALITY PUBLIC SERVICES—People want to live in communities with reliable services, quality public schools, access to health care, and business-friendly environments. Local governments must balance a variety of community needs and priorities with limited budgets.

- Work with school boards and institutions to ensure high-quality education is provided to all students regardless of their income, background, or ability. Schools should be safe places where students have access to new technologies and experiential learning opportunities that will make them successful in their future careers.

- Improve access to quality and affordable health care throughout the region. Promote primary prevention strategies and healthy built environments as ways to reduce health care needs. In rural communities, technology must be a part of the answer as the region addresses its mental and physical health challenges.
- Perform essential governmental duties well and provide good customer service for residents and businesses. This is accomplished with strong elected leaders and well-trained staff. Local leaders and officials must also understand their role in driving community livability and redevelopment projects.

Performance Measures: Regional Progress from 2015 → 2017

- ___ brownfield assessments and cleanup projects completed
- ___ new miles of sidewalks, bike lanes, and greenways constructed
- ___ public spaces created or revitalized
- ___ housing units repaired or renovated
- ___ affordable & workforce housing units created
- ___ affordable senior housing units created
- ___ ADA accessibility improvements to housing units
- ___ regional college degree and certificate completions
- ___ percent of population with a college degree (Associate - Graduate; ___% in 2015)

BUILDING A REGION WHERE

OTHERS WANT TO VISIT

1. TOURISM DEVELOPMENT—Investment by communities in regional tourism development programs can yield significant economic benefits for local governments and businesses. Professional staff are essential for developing resources and promoting regional tourism across a range of media platforms.

- Support regional tourism development programs to market sites, attractions, and local businesses.
- Create regional guides for special-interest travelers such as rock climbers, historians, and distillery enthusiasts.
- Install signage and wayfinding devices so visitors can find and identify local attractions.
- Work with chambers of commerce and local businesses to market experiences to travelers and tourists; this may include package deals, promotion of special events, and web-based business development.

2. CREATIVE PLACEMAKING—Communities should celebrate their unique heritage and use this to create a genuine sense of place. This can form the basis for tourism and market campaigns, local festivals, architectural styles, public art, community parks, and other public spaces.

- Adopt an authentic community brand that celebrates local heritage and a community's unique qualities.
- Update local development regulations to integrate placemaking principles in downtowns and tourism districts.
- Support public art as an economic development and placemaking strategy. Public art enhances community character, improves community aesthetics, and helps tell a community's story. It also attracts young families and higher-income visitors and residents to communities. Public art can include statues, sculptures, murals, alleyway conversions, special installations, and places that allow visitors to capture the "perfect selfie."

3. PROTECTING NATURAL AND HISTORIC TREASURES—The rugged landforms and stunning natural beauty comprise some of the region's most important assets. The mountains, valleys, lakes, and rivers provide beautiful home sites, outdoor recreation opportunities, and natural resource industries that sustain local economies. These must be conserved and protected from reckless exploitation and environmental degradation. In addition, historic buildings and neighborhoods are landmarks in many communities, providing architectural interest and glimpses into the region's past. These should be preserved for future generations.

- Conserve natural areas and protect areas of pristine wilderness from degradation and pollution.
- Mitigate the impacts of development on ecosystems, water bodies, and scenic viewsheds to the extent possible.
- Improve parking and public access to hiking trails, waterfalls, canoe launches, and rock-climbing areas.
- Support historic preservation projects and initiatives throughout the region.
- Encourage private owners and developers to maintain the integrity and unique qualities of historic buildings.

Performance Measures: Regional Progress from 2015 → 2017

- ___ in annual economic impacts from tourism (vs. \$ ___ in 2015)
- ___ heritage celebrations and community festivals held per year
- ___ regional tourism guides created or updated
- ___ trails and tourism sites added to Google Maps
- ___ placemaking and public art projects completed
- ___ acres added to land trusts or conservation areas
- ___ sites added to the National Registered of Historic Places
- ___ historic buildings renovated or saved

BUILDING A REGION WHERE

BUSINESS & INDUSTRY WANT TO INVEST

1. WORKFORCE DEVELOPMENT—Advanced industries are the future of American manufacturing. The region’s ability to meet the workforce demand for these industries is currently limited. Training workers and students for careers in these advanced, high-paying industries is essential for the region’s economic success.

- Identify skills gaps in the labor force and align workforce development programs to meet employer needs.
- Eliminate the stigma of manufacturing jobs through exploratory career and work-based learning programs.
- Encourage colleges and universities to promote degrees that will help students get good jobs in our region.
- Retrain and educate displaced workers so they can obtain employment with today’s advanced industries.
- Provide soft skills training to students and young workers to improve their professional and interpersonal skills.

2. HEALTHY LABOR FORCE—A healthy population and workforce consists of healthy individuals. Improving the region’s health problems requires more than money and new hospitals. Better health requires dedication and commitment by individuals: eating healthy, being active, staying drug-free, and preventative care.

- Support initiatives to create a healthy, drug-free workforce by reducing substance and opioid abuse.
- Partner with the TN Dept. of Health on efforts to improve population health and create healthier communities.
- Encourage schools and employers to implement health improvement programs for students and employees.
- Develop recreation areas, conduct healthy living workshops, and build exercise spaces in local communities.

3. INFRASTRUCTURE AND SITE DEVELOPMENT—Commercial, industrial, and residential developments require reliable utility services. High-speed broadband is absolutely essential for today’s businesses and industries. The region’s economy is dependent of safe and efficient movement of goods and people.

- Expand affordable high-speed broadband—“the Highway System of the 21st Century”—throughout the region.
- Improve utility systems with interconnections and system redundancy for provide reliable, uninterrupted service.
- Get industrial sites certified in order to demonstrate a community’s commitment to economic development.
- Prioritize transportation projects that reduce congestion, improve safety, and enhance regional connectivity.

4. ENTREPRENEURS AND BUSINESS STARTUPS—All successful businesses start with an idea. Turning that idea into a sustainable business operation requires experimentation and access to resources that allow it to grow. Supporting entrepreneurs and small businesses should be a priority for our region, especially in rural communities.

- Ensure businesses have access to the capital they need for startup and expansion.
- Establish business incubators in rural communities that give entrepreneurs and innovators the time and resources they need to develop sustainable business models and fine-tune their operations.
- Support small businesses by developing local supply chains and working with local vendors whenever possible.

Performance Measures: Regional Progress from 2015 → 2017

- ___ change in regional unemployment rate
- ___ change in size of regional labor force
- ___ increase in no. adults with an associate's degree (39,075 in 2015 vs. 40,167 in 2017)
- ___ increase in no. adults with a bachelors or graduate degree (117,256 in 2015 vs. 121,263 in 2017)
- ___ WIOA On-the-Job Trainings
- ___ WIOA Youth Occupational Skills Trainings
- ___ WIOA Incumbent Worker Trainings
- ___ increase in broadband availability
- ___ acres of available industrial property
- ___ utility improvement projects
- ___ total number of small businesses (fewer than 25 employees)
- ___ total number of businesses (all sizes)

BUILDING A REGION WHERE

COMMUNITIES ARE RESILIENT & READY FOR SUCCESS

1. COMMUNITY RESILIENCY—Resiliency means taking proactive steps and preparing local communities and region as a whole to respond, recover, and get back on track in the event of a major manmade or natural disaster. Resilient communities respond better in a crisis, recover more quickly, and often emerge stronger.

- Ensure public officials and emergency personnel have proper training and equipment, and conduct readiness drills.
- Construct residential structures to meet building codes and locate them outside of floodplains.
- Adopt plans to ensure essential government services are provided in emergency situations.
- Develop utility interconnections and redundant power supplies to minimize disruptions during droughts or outages.

2. ECONOMIC DIVERSIFICATION—The region’s economy remains heavily concentrated in traditional manufacturing, transportation, and logistics. To help insulate the region’s workforce and economy from abrupt changes in these industries and the global marketplace, efforts should be taken to grow other industries and train workers for 21st century jobs.

- Increase employment across multiple sectors by attracting new industries outside of manufacturing and logistics.
- Provide training for dislocated workers to obtain high-paying jobs at advanced industries.
- Support tech startups and entrepreneurial enterprises to help build the region’s innovation economy.

3. WORKFORCE SUCCESSION—As the workforce ages and many baby boomers retire, there are concerns about having enough workers to fill these jobs, especially advanced health care and other professional positions. Our region must ensure its workforce is able to provide essential services for our population and meet industry needs.

- Work with educational institutions to highlight careers with projected growth and advancement.
- Consider offering incentives to place professionals and who will provide essential services in rural areas.
- Promote internships, work-based learning programs, and other opportunities to introduce students to needed jobs.
- Engage retired professionals to volunteer and become involved in their communities.

4. LEADERSHIP AND CIVIC CAPACITY—Communities need strong leaders who are willing to try new ideas while also basing public decisions on sound legal and financial principles. Making progress on local and regional priorities requires engagement by many stakeholders and a commitment to long-term planning and follow-through.

- Educate local leaders on the basics of public finance, planning, and community & economic development.
- Build community capacity to advance projects and initiatives that transcend and one person or political term. One strategy to accomplish this involves restructuring JECDBs to make them more relevant.
- Encourage young citizens to become engaged in local government as a way of developing tomorrow’s leaders.
- Commit to regional collaboration and partnerships as a way of achieving regional solutions for regional problems.

Performance Measures: Regional Progress from 2015 → 2017

- ___ % of the region's communities participating in the National Flood Insurance Program
- ___ % of the region's population lives in a community with residential building codes
- ___ % of the region's counties have current Emergency Response Plans
- ___ no. of jobs added in advanced manufacturing industries
- ___ no. of jobs added in STEM occupations
- ___ rank for economic cluster diversity (out of 384 development districts nationwide)

COMMUNITY DATA

	BLED SOE	BRADLEY	CATOOSA	DADE	GRUNDY	HAMILTON	McMINN
POPULATION (2017 Pop.)	15,016	105,407	66,788	16,179	13,336	360,568	52,930
2030 Population Projection	14,554	119,644	74,878	16,353	14,135	398,076	58,119
2010-2017 Population Change	+16.8%	+6.3%	+4.3%	-2.6%	-2.9%	+6.9%	+1.4%
2016 Median Age	43.0	39.3	39.3	40.3	43.0	39.3	42.9
2017 Senior Population (65+)	2,568	18,134	11,784	3,103	2,957	63,319	10,622
2030 Projected Senior Pop. (65+)	3,940	26,836	16,998	3,495	4,973	89,283	16,312
LABOR FORCE (Current Size)	4,082	50,232	32,565	8,145	4,854	173,191	22,861
Labor Force Particip. Rate (20-64)	57.9%	73.7%	78.07%	74.94%	58.4%	76.5%	67.7%
Seniors in Labor Force (65+)	227	2,381	1,888	441	406	8,882	1,298
2017 vs. 2007 Labor Force	-552	+1,904	-2,888	-291	-1,140	+4,402	-2,045
October 2017 Unemployment Rate	7.0%	4.7%	4.9%	5.3%	7.6%	5.1%	5.8
JOBS (Total Jobs in County)	1,375	42,030	14,305	3,287	2,006	197,751	17,576
Annual Job Openings	378	6,316	2,161	502	329	25,007	2,530
Leave Home County for Work	3,361	19,899	20,277	4,292	4,105	34,932	10,119
Outside Workers Entering County	1,275	18,563	8,972	1,958	863	83,043	8,116
INCOME (Median Household)	\$38,535	\$43,721	\$52,265	\$43,463	\$28,467	\$49,434	\$38,661
Per Capita Income	\$18,962	\$24,099	\$23,834	\$21,997	\$16,132	\$28,456	\$20,742
Avg. Hourly Wage (All Jobs)	\$16.80	\$18.36	\$18.90	\$18.78	\$15.37	\$20.39	\$17.31
Cost-of-Living Index (Baseline =100)	85.4	93.8	95.8	94.7	88.2	98.0	90.7
Adults w. H.S. Diploma or Equivalent	78.0%	82.5%	83.3%	80.3%	71.1%	87.0%	82.5%
Adults w. Assoc. Degree or Higher	16.4%	26.9%	28.2%	23.6%	14.4%	35.4%	22.8%
POVERTY RATE (All Ages)	23.7%	18.4%	11.8%	16.6%	28.0%	14.8%	19.5%
Children Living in Poverty	29.5%	28.5%	7.9%	12.8%	37.1%	21.7%	26.5%
Seniors Living in Poverty	14.9%	9.3%	7.9%	12.8%	17.4%	9.0%	10.8%

Sources: U.S. Census Bureau, Bureau of Labor Statistics, Stats America, TN & GA Depts. of Labor, GA Gov. Office of Planning & Budget, Emsi, UT Center for Business

MARION	MEIGS	POLK	RHEA	SEQUATCHIE	WALKER	GEORGIA	TENNESSEE	USA	REGION
28,509	12,038	16,788	32,534	15,029	67,912	10,407,735	6,697,613	325,401,909	803,034
31,227	13,748	19,392	38,185	19,425	71,200	12,173,406	7,846,308	359,402,000	881,783
+1.0%	+2.1%	-0.1%	+2.1%	+6.3%	-1.4%	+7.1%	+5.4%	+5.2%	+4.1%
43.2	43.9	44.6	40.3	42.5	40.7	38.0	38.7	37.9	40.6
5,756	2,568	3,530	6,172	3,214	12,320	1,404,991	1,077,960	50,711,208	146,047
9,275	4,581	5,194	9,831	5,587	18,707	2,336,267	1,696,462	72,092,000	215,013
12,139	5,025	7,446	13,528	5,995	30,458	4,918,505	3,175,000	160,381,000	370,830
68.1%	60.6%	67.7%	70.6%	66.9%	68.9%	71.4%	71.5%	77.0%	71.0%
741	225	279	939	431	1,520	220,013	169,525	7,96,598	18,714
-1,015	+96	+298	+354	-190	-2,626	+150,375	+259,320	+7,198,000	-3,693
6.7%	6.6%	6.1%	7.6%	6.4%	5.5%	5.1%	4.6%	5.0%	5.4%
7,485	1,948	2,377	11,044	2,997	13,014	4,290,061	2,901,328	142,398,161	317,608
1,106	319	356	1,540	484	1,725	560,972	385,284	18,152,795	17,556
8,048	3,493	5,462	5,993	4,353	18,542	39,255	15,864	—	146,876
3,875	1,067	1,087	3,743	1,489	5,906	GA→TN	TN→GA	—	139,957
\$41,477	\$35,209	\$41,520	\$38,355	\$46,541	\$41,539	\$51,037	\$46,574	\$55,322	\$45,790
\$22,056	\$19,976	\$22,768	\$20,888	\$21,605	\$21,588	\$26,678	\$26,019	\$29,829	\$25,020
\$17.36	\$17.14	\$17.43	\$17.64	\$17.73	\$18.51	\$22.35	\$20.34	\$23.80	\$19.50
92.3	89.9	90.5	89.5	91.7	94.9	100.4	95.9	113.3	95.1
76.8%	75.1%	77.6%	76.8%	82.0%	79.6%	85.0%	84.9%	86.4%	83.4%
19.7%	13.0%	17.0%	16.4%	21.4%	20.8%	35.3%	30.9%	37.2%	28.3%
19.2%	18.8%	17.8%	22.9%	16.1%	18.4%	17.8%	17.2%	15.6%	16.7%
27.5%	26.3%	27.0%	35.3%	19.6%	23.8%	25.4%	25.1%	21.2%	24.0%
10.9%	10.7%	15.3%	12.9%	8.6%	7.9%	10.4%	9.7%	9.3%	9.6%

SPRING CITY

DECATUR

DAYTON

PIKEVILLE

DUNLAP

SIGNAL MOUNTAIN

GRUETLI-LAAGER

WHITWELL

JASPER

MONTEAGLE

SOUTH PITTSBURG

setbuilds
setcares
setworks
www.sedev.org

Download this CEDS report online at <http://www.sedev.org/reports>

REGION FROM ABOVE: 13 COUNTIES AT 100,000 FEET