



Economy

the **Ochs Center**
for metropolitan studies

The State of the Region **2010**



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Notes on Data

Bureau of Economic Analysis

Located in the U.S. Department of Commerce, the Bureau of Economic Analysis (BEA) provides data about the nation's economy from gross domestic product measures to industrial data. It provides data on economic growth at the national and regional level. See bea.gov.

Bureau of Labor Statistics

The Bureau of Labor Statics (BLS) provides labor economic data. It is an agency of the U.S. Department of Labor. The BLS reports on labor market activity, working conditions and price changes. See bls.gov.

Equal Employment Opportunity Commission

The Equal Employment Opportunity Commission (EEOC) is responsible for overseeing discrimination in the workplace. Employers with over 15 employees are subject to EEOC laws. The EEOC provides data on minorities and women in the work force. See eeoc.gov.

Local Employment Dynamics

The U.S. Census Bureau, Center for Economic Studies, Local Employment Dynamics data is the result of a voluntary partnership between the Census Bureau and state labor data providers. Several indicators are available at various levels of analysis. States provide quarterly worker and business wage information which is merged with Census data about households and businesses. The data provide quarterly workforce indicators, worker demographics, and spatial information about live and work. See lehd.did.census.gov.

Ochs Center State of the Region Survey

The State of the Region Report (SORR) includes survey data from telephone surveys of Hamilton County adults. The survey asked a series of questions related to quality of life, health, jobs, and education in Hamilton County. The 2010 survey had a sample size of 800 randomly selected Hamilton County adults and an additional oversample of 372 interviews with African Americans and Latinos to ensure adequate representation of both population subgroups. The 2010 survey included 200 completes from cell phone calls. For the 2006 and 2008 SORR surveys, the sample size was 1,000 Hamilton County residents and included only landline telephones. For all three surveys, the survey data was weighted to correspond more precisely to demographic estimates of the Hamilton County population. Demographic variables included in weighting were age and race.

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Executive Summary

In 2009, there were approximately 216,000 jobs in the six-county Chattanooga Metropolitan Statistical Area MSA. The sectors with the most workers were manufacturing (28,492), retail trade (23,838), accommodation and food services (20,314) and transportation and warehousing (14,442). Eight out of ten jobs and more than three-fourths of all firms in the MSA were located in Hamilton County.

Between 2001 and 2009, employment in the MSA declined by six percent – largely due to job losses that took place during the recession that began in December 2007. Between 2007 and 2009, three of the region's largest sectors – transportation and warehousing (-26.2%), construction (-22.7%), and manufacturing (-19.1%) – experienced declines in employment of more than 15%.

Between 2001 and 2009, annual average pay increased by approximately 27% across the MSA. Hamilton County had the highest annual average pay within the MSA – \$39,569 in 2009. Over the 2001 to 2009 period, annual average pay grew fastest in Dade County, up 41.1%.

Four occupational categories – office and administrative support, sales, production and food preparation and serving – each accounted for more than 20,000 jobs in the region in 2009. Employment in computer and mathematical occupations increased more than 120% between 2001 and 2009, up from 1,730 to 3,380 – the fastest growth of any occupation category in the region. While employment in health care practitioner and technical occupations grew at a slightly slower rate (48%), there were over 5,000 more workers employed in these occupations in 2009 than in 2001.

Between 2001 and 2009, private sector employment in Hamilton County declined by more than 10,000 jobs. Manufacturing sustained the greatest job losses – down from 29,990 in 2001 to 20,723 in 2009. During the same period, the number of workers in health care and social assistance grew by 52.8%, a total increase of 7,525 jobs.

In 2008, per capita income in Hamilton County was higher than in the MSA or Tennessee but lower than the national per capita income. Between 2000 and 2008, the per capita income rate of growth in Hamilton County trailed the nation, the State and the MSA.

Economic opportunity frequently depends on educational attainment. A 2010 survey of Hamilton County residents found that 45% of respondents with a high school education or less rated job employment availability as poor, a rate more than twice the rate for college graduates. In Hamilton County, for individuals 25 years and older without a high school degree, the poverty rate is 26% – nearly three times the overall 10% rate and more than eight times the poverty rate among adults with a college degree.

Among benchmark counties in Tennessee, Hamilton County had the lowest poverty rate and second highest median household income in 2008. But among all eleven benchmark counties, Hamilton County had the sixth highest poverty rate and the ninth highest median household income. Among all benchmark counties, Hamilton County was sixth in unemployment in 2009 – the middle of the group. But by July 2010, Hamilton County had the third lowest unemployment rate among benchmark counties.

In 2008, Downtown was home to 72.5% of all jobs in the Finance and Insurance sector and also had the highest concentration of manufacturing jobs in the county (18%). Jobs in the Health Care and Social Assistance sector were heavily concentrated in the Bushtown/Highland Park (28.1%) and Glenwood/Eastdale (23.5%) subregion – the location of Memorial and Parkridge hospitals. Hickory Valley/Hamilton Place was the location of the highest concentration of retail employment – 26% of all retail jobs in the county. Jobs in the Accommodation and Food Services sector were most highly concentrated in the Downtown (30.5%) and Hickory Valley/Hamilton Place (17.2%) subregions.

Introduction

With the nation slowly recovering from the recession that began in December 2007, 83% of Hamilton County residents surveyed earlier this year cited the “availability of jobs at a living wage” as very important to their quality of life in the Chattanooga region.¹

Jobs and the Economy in the Chattanooga Region

Employment, Firms and Salary

As of 2009, there were 216,198 jobs and 11,137 firms in the six county Chattanooga metropolitan statistical area (MSA) that includes Catoosa, Dade, and Walker counties in Georgia and Hamilton, Marion, and Sequatchie counties in Tennessee. Hamilton County accounted for 82.2% of total employment in the MSA, 83.6% of private employment and 76.4% of all firms.²

During 2009, there were six percent fewer jobs across the counties in the MSA than in 2001 – with employment holding steady at 2001 levels in Marion County and down by almost 15% in Walker County. Still, the number of firms in the MSA increased by 10.5% –down by 1.4% in Walker County but up by nearly one-quarter in Sequatchie County.

Table 1: Determining quality of life

	Very Important 2010	Very Important 2008	Very Important 2006
Safety from crime	91%	90%	87%
Quality health care and hospitals	90%	89%	86%
Quality schools	83%	83%	79%
Availability of jobs that pay a living wage	83%	81%	77%
Clean air	82%	83%	78%
Clean streets and neighborhoods	80%	80%	76%
Affordability of housing	75%	74%	72%
A place where people of all backgrounds are welcome	70%	72%	66%
A strong religious community	63%	63%	58%
A strong sense of community	61%	64%	63%
Parks and other outdoor recreational opportunities	59%	61%	56%
Short commuting time	44%	52%	47%
Arts and cultural opportunities	42%	46%	38%

Source: Ochs Center Survey of Hamilton County Residents: 2006, 2008, 2010

Table 2: Chattanooga MSA employment and firms, 2009

	Employment		Firms	
	Hamilton County	Chattanooga TN- MSA	Hamilton County	Chattanooga MSA
Total Employment	177,793	216,198	8,512	11,137
Private	153,026	182,881	8,337	10,778
Public	24,767	33,317	175	359

Source: Bureau of Labor Statistics

¹ Ochs Center State of the Region Survey, 2010

² Public Sector firms are organizations classified as part of the federal, state, or local government within the geographic location under analysis.

Between 2001 and 2009, average annual pay increased by 26.6%. Workers in Hamilton County continued to have the highest average annual average pay in the MSA, exceeding the regional average by 4.6% in 2009. Average annual salary in Dade, Marion, and Sequatchie Counties, however, grew at faster rates, with salaries in Dade growing by more than 40% since 2009.

Employment by Industry

Across the MSA, the top five private sector industries by employment in 2009 were manufacturing, retail trade, accommodation and food services, transportation and warehousing, and finance and insurance. These same industries were also the leading private sector employers in 2001.³

Between 2001 and 2009, employment in the MSA went through two significant periods of change. Between 2001 and 2007, employment in the MSA grew by 3.2% – with most of that increase taking place between 2004 and 2007 when the MSA saw a net gain of just over six thousand jobs. Those gains, however, were offset by the loss of more than 20,000 jobs in the MSA between 2007 and 2009.

Changes in employment by industry clearly reflect the differences between these two phases. So, for example, the

³ At the MSA level, employment by industry is not available for all industries – including for certain major industries such as health care.

construction industry saw a 14.9% gain in employment between 2001 and 2007 – only to decline by 22.7% between 2007 and 2009.

Overall, the industries with the greatest rates of decline in employment between 2001 and 2009 were manufacturing, transportation and warehousing and retail trade. Together these three industries employed over 23,000 fewer workers in 2009 than in 2001 – equaling virtually all of the net job loss in the MSA during that period.

The manufacturing sector lost more than 15% of its jobs from 2001 to 2007, with job loss accelerating to more than 19% over the next two years, contracting by nearly one third over the entire period. The sector nevertheless retained its position as the largest employer in the region, accounting for approximately 28,500 jobs in 2009.

While the transportation and warehousing sector declined by only 1% from 2001 to 2007, the sector lost approximately 5,000 jobs between 2007 and 2009 and fell to fourth among the largest employers in the region, with fewer than 14,500 workers.⁴

⁴ For the purposes of analysis by the Bureau of Labor Statistics, employment in Transportation and Warehousing is based on firm location rather than actual location of employment. As a result, the concentration of national trucking firms in the region may explain the relatively high number of employees in this industrial sector.

Table 3: Chattanooga MSA employment and firm growth by county, 2001-2009

	2001			2009			Growth %		
	Annual Average Establishment Count	Annual Average Employment	Annual Average Pay	Annual Average Establishment Count	Annual Average Employment	Annual Average Pay	Annual Average Establishment Count	Annual Average Employment	Annual Average Pay
Georgia									
Catoosa County	800	14,587	\$25,311	909	13,626	\$30,994	13.6%	-6.6%	22.5%
Dade County	225	3,320	\$21,905	238	2,878	\$30,911	5.8%	-13.1%	41.1%
Walker County	808	15,071	\$24,124	797	12,860	\$28,641	-1.4%	-14.7%	18.7%
Tennessee									
Hamilton County	7,649	187,724	\$31,240	8,512	177,793	\$39,569	11.3%	-5.3%	26.7%
Marion County	424	6,774	\$22,114	477	6,776	\$29,372	12.5%	0.0%	32.8%
Sequatchie County	177	2,536	\$21,597	219	2,265	\$29,460	23.7%	-10.7%	36.4%
Chattanooga MSA	10,081	230,002	\$29,898	11,137	216,198	\$37,838	10.5%	-6.0%	26.6%

Source: Bureau of Labor Statistics

retail trade, the second largest sector among those for which 2009 MSA-level data was available, lost almost 9% of its jobs in the period prior to the recession and continued to retract at a slightly higher rate over the next two years, leading to an overall loss of more than 17%. By 2009, retail trade employed approximately 24,000 people in the MSA, compared to almost 29,000 in 2001.

The fastest growing sectors in the region between 2001 and 2009 were information (28.1%), accommodation and food services (18.0%), arts, entertainment and recreation (10.3%) and professional and technical services (7.5%). Employment in these four sectors grew by just over 4,700 jobs between 2001 and 2009. Public sector employment remained largely unchanged between 2007 and 2009, but grew by 1,272 jobs since 2001.

Table 4: Chattanooga MSA employment by industry, 2001-2009

	2001	2004	2007	2009	2001-2009 Growth %	2001-2007 Growth %	2007-2009 Growth %
TOTAL	230,002	231,155	237,354	216,198	-6.0%	3.2%	-8.9%
Construction	9,275	8,881	10,657	8,239	-11.2%	14.9%	-22.7%
Manufacturing	41,634	35,144	35,205	28,492	-31.6%	-15.4%	-19.1%
Wholesale trade	8,177	8,964	8,604	7,897	-3.4%	5.2%	-8.2%
Retail trade	28,804	29,036	26,295	23,838	-17.2%	-8.7%	-9.3%
Transportation & warehousing	19,750	19,346	19,559	14,442	-26.9%	-1.0%	-26.2%
Information	2,794	2,782	3,821	3,578	28.1%	36.8%	-6.4%
Finance & insurance	13,528	14,219	14,346	14,074	4.0%	6.0%	-1.9%
Real estate & rental & leasing	2,644	2,788	2,860	2,511	-5.0%	8.2%	-12.2%
Professional & technical services	8,219	8,283	8,613	8,834	7.5%	4.8%	2.6%
Management of companies & enterprises	3,306	3,935	ND	ND			
Administrative support, remediation services	11,943	12,574	ND	ND			
Educational services	2,606	2,684	2,829	ND		8.6%	
Health care and social assistance	ND	20,188	24,813	ND			
Arts, entertainment & recreation	2,224	ND	ND	2,452	10.3%		
Accommodation & food services	17,209	ND	ND	20,314	18.0%		
Private Sector	197,957	198,063	204,024	182,881	-7.6%	3.1%	-10.4%
Public Sector	32,045	33,092	33,330	33,317	4.0%	4.0%	0.0%

Source: Bureau of Labor Statistics

Occupation

In the Chattanooga MSA, the distribution of employees among occupations matches the national distribution within one percentage point for 17 out of 22 occupational categories. The Production, Healthcare Practitioner, and Transportation occupations account for a higher share of the workforce in the MSA than the national average, while a smaller percentage of workers in the Chattanooga area identify themselves as members of Education/Training and Personal Care occupations than nationally.

In 2009, Office and Administrative Support occupations accounted for 17.5% of workers in the region. Production, Sales and Related Occupations, and Food Preparation/Serving and Related Occupations, each accounted for approximately 10% of the work force.

Table 5: Chattanooga MSA and United States occupation proportions, 2009

Occupation (SOC code)	Chattanooga MSA		United States	
	Employment	Proportion	Employment	Proportion
Total, all Occupations	222,890		130,647,610	
Management Occupations	11,670	5.2%	6,116,380	4.7%
Business and Financial Operations Occupations	8,270	3.7%	6,063,670	4.6%
Computer and Mathematical Science Occupations	3,830	1.7%	3,303,690	2.5%
Architecture and Engineering Occupations	2,030	0.9%	2,412,730	1.8%
Life Physical and Social Science Occupations	840	0.4%	1,308,380	1.0%
Community and Social Services Occupations	2,320	1.0%	1,891,320	1.4%
Legal Occupations	1,180	0.5%	999,020	0.8%
Education Training and Library Occupations	11,370	5.1%	8,488,740	6.5%
Arts Design Entertainment Sports and Media Occupations	2,240	1.0%	1,745,670	1.3%
Healthcare Practitioner and Technical Occupations	16,650	7.5%	7,200,950	5.5%
Healthcare Support Occupations	6,740	3.0%	3,886,690	3.0%
Protective Service Occupations	5,160	2.3%	3,172,420	2.4%
Food Preparation and Serving Related Occupations	20,740	9.3%	11,218,260	8.6%
Building and Grounds Cleaning and Maintenance Occupations	7,080	3.2%	4,269,480	3.3%
Personal Care and Service Occupations	2,800	1.3%	3,461,910	2.6%
Sales and Related Occupations	21,720	9.7%	13,715,050	10.5%
Office and Administrative Support Occupations	38,960	17.5%	22,336,450	17.1%
Farming Fishing and Forestry Occupations	150	0.1%	419,200	0.3%
Construction and Extraction Occupations	8,210	3.7%	5,751,630	4.4%
Installation Maintenance and Repair Occupations	9,090	4.1%	5,114,150	3.9%
Production Occupations	22,940	10.3%	8,927,130	6.8%
Transportation and Material Moving Occupations	18,890	8.5%	8,844,700	6.8%
TOTAL		100.0%		100.0%

Source: Bureau of Labor Statistics

Between 2001 and 2009, employment in nine occupational categories in the Chattanooga MSA exhibited growth rates of 10% or more, with four occupations growing by more than 30%:

- Computer/Mathematical
- Arts/Design/Entertainment/Sports/Media
- Healthcare Practitioner/Technical
- Food Preparation/Serving

Of those occupations, the Computer/Mathematical category outpaced the others significantly, growing by more than 120%.

Five occupational categories lost jobs, with the largest decline, nearly 40%, in Architecture and Engineering occupations. Other occupations experiencing reductions in this time period include:

- Production
- Construction and Extraction
- Management
- Personal Care and Service Occupations

Table 6 : Chattanooga MSA occupational change, 2001-2009

	2001	2009	%
Computer and Mathematical Occupations	1,730	3,830	121.4%
Arts, Design, Entertainment, Sports, and Media Occupations	1,400	2,240	60.0%
Healthcare Practitioner and Technical Occupations	11,250	16,650	48.0%
Food Preparation and Serving Related Occupations	15,810	20,740	31.2%
Healthcare Support Occupations	5,270	6,740	27.9%
Building and Grounds Cleaning and Maintenance Occupations	5,860	7,080	20.8%
Education, Training, and Library Occupations	9,720	11,370	17.0%
Life, Physical, and Social Science Occupations	720	840	16.7%
Legal Occupations	1,070	1,180	10.3%
Business and Financial Operations Occupations	7,680	8,270	7.7%
Sales and Related Occupations	20,180	21,720	7.6%
Office and Administrative Support Occupations	37,620	38,960	3.6%
Protective Service Occupations	5,040	5,160	2.4%
Installation, Maintenance, and Repair Occupations	8,910	9,090	2.0%
Personal Care and Service Occupations	2,980	2,800	-6.0%
Management Occupations	12,450	11,670	-6.3%
Construction and Extraction Occupations	9,630	8,210	-14.7%
Production Occupations	29,660	22,940	-22.7%
Architecture and Engineering Occupations	3,280	2,030	-38.1%

Source: Bureau of Labor Statistics

Average salaries rose from 2004 to 2009 for every occupation except for Sales Representatives. Education administrators, postsecondary education teachers, and insurance underwriters received the highest percentage pay increases, ranging from 37% to 47%.

Occupation by Race and Gender

Men held 54% of all jobs in the Chattanooga region in 2008, the most recent year for which race and gender employment data is available.⁵ Workforce participation by gender differed among whites, Latinos and African Americans. Among whites and Latinos, males accounted for a majority of the workforce while among African Americans in the region, women accounted for a slight majority.

Men exceed 60% of the workforce in the following occupations:

- Craft Workers
- Executive Officials and Managers
- Operatives [manufacturing occupations]
- Mid-Level Officials and Managers
- Laborers

Women, on the other hand, hold a majority of jobs in occupations categorized as:

- Office/Clerical
- Professional
- Technician
- Service workers
- Sales

⁵ United States Equal Opportunity Commission, EEO-1 Dataset, Chattanooga MSA, 2008. For the purposes of this analysis, the EEOC defines the Chattanooga region as the core based statistical area (CBSA) that includes the MSA and Bradley, McMinn and Polk counties. As part of its mandate under Title VII of the Civil Rights Act of 1964, as amended, the Equal Employment Opportunity Commission requires periodic reports from public and private employers, and unions and labor organizations which indicate the composition of their work forces by sex and by race/ethnic category. Key among these reports is the EEO-1, which is collected annually from Private employers with 100 or more employees or federal contractors with 50 more employees. In 2003, over 40,000 employers with more than 50 million employees filed EEO-1 reports.

Table 7 : Chattanooga MSA occupational salaries for selected occupations, 2004-2009

OCCUPATION	2004 Salary	2009 Salary	Growth %
Insurance Underwriters	\$44,260	\$65,120	47.1%
Education Teachers, Postsecondary	\$37,120	\$54,390	46.5%
Education Administrators, All Other	\$51,500	\$70,730	37.3%
Real Estate Sales Agents	\$39,430	\$52,640	33.5%
Health Educators	\$33,370	\$44,390	33.0%
Physical Therapist Assistants	\$40,830	\$52,360	28.2%
Industrial Engineers	\$57,470	\$73,150	27.3%
Pharmacists	\$94,450	\$117,890	24.8%
Machinists	\$31,430	\$38,860	23.6%
Registered Nurses	\$47,350	\$57,580	21.6%
Chief Executives	\$129,550	\$155,590	20.1%
Middle School Teachers	\$38,920	\$46,400	19.2%
Medical Assistants	\$23,440	\$27,490	17.3%
Physicians and Surgeons, All Other	\$181,280	\$21,2470	17.2%
Public Relations Specialists	\$34,780	\$40,380	16.1%
Social and Human Service Assistants	\$25,310	\$28,660	13.2%
Nursing Aides, Orderlies, and Attendants	\$19,670	\$22,220	13.0%
Construction Laborers	\$24,690	\$27,760	12.4%
General and Operations Managers	\$82,860	\$92,710	11.9%
Management Occupations	\$74,460	\$82,410	10.7%
Healthcare Practitioner and Technical Occupations	\$55,130	\$60,690	10.1%
Licensed Practical and Licensed Vocational Nurses	\$32,540	\$35,650	9.6%
Laborers and Freight, Stock, and Material Movers	\$21,670	\$23,640	9.1%
Sheet Metal Workers	\$33,560	\$36,050	7.4%
Computer Programmers	\$53,350	\$56,890	6.6%
Dental Assistants	\$28,090	\$29,680	5.7%
Civil Engineering Technicians	\$43,160	\$44,400	2.9%
Civil Engineers	\$65,470	\$66,560	1.7%
Fire Fighters	\$30,970	\$31,210	0.8%
Sales Representatives, Services, All Other	\$49,800	\$48,120	-3.4%

Source: Bureau of Labor Statistics

In 2008, more than three quarters of the total workforce was white. Whites accounted for more than 95% of Executive-Level Officials and Managers, nearly 90% of Professionals and Mid-Level Officials/Managers and more than four out of every five employees in the categories of:

- Craft Workers
- Technicians
- Sales Workers
- Office/Clerical Workers

African Americans, who accounted for approximately 16% of the regional workforce, represented more than 20% of those in the laborer, service worker, and operative occupations; Latinos, who made up just over 4% of the total workforce, represented more than 12% of laborers and about 7% of service workers and operatives.

Table 8: Chattanooga MSA EEOC labor participation rate by occupation and race/gender, 2008

Racial/ Ethnic Group and Sex	Total Employment	Executive/ Senior-Level Officials and Managers	First/ Mid-Level Officials and Managers	Professionals	Technicians	Sales Workers	Office and Clerical Workers	Craft Workers	Operatives	Laborers	Service Workers
All Employees	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Men	54.0	77.7	62.4	38.3	42.9	45.7	19.9	88.6	75.7	60.9	45.0
Women	46.0	22.3	37.6	61.7	57.1	54.3	80.1	11.4	24.3	39.1	55.0
WHITE	77.8	95.9	89.5	89.9	84.2	83.9	80.3	88.5	70.7	61.1	67.8
Men	42.1	74.7	56.3	35.0	37.9	39.7	16.1	80.3	53.7	37.6	29.7
Women	35.8	21.2	33.2	54.9	46.3	44.2	64.2	8.2	17.0	23.5	38.1
MINORITY	22.2	4.1	10.5	10.1	15.8	16.1	19.7	11.5	29.3	39.0	32.2
Men	11.9	3.0	6.1	3.4	5.0	6.0	3.7	8.3	22.0	23.3	15.3
Women	10.3	1.1	4.4	6.7	10.8	10.1	15.9	3.1	7.3	15.6	16.9
AFRICAN AMERICAN	16.2	1.6	7.5	6.6	12.8	12.5	17.3	8.5	21.2	24.4	23.4
Men	8.0	1.0	4.0	1.7	3.5	4.3	3.0	5.8	16.0	13.6	9.5
Women	8.2	0.6	3.6	4.9	9.3	8.2	14.3	2.7	5.2	10.8	13.9
LATINO	4.2	0.8	1.5	1.0	1.2	1.7	1.3	1.8	6.5	12.2	7.0
Men	2.9	0.7	1.1	0.4	0.6	0.9	0.4	1.5	4.9	8.4	4.9
Women	1.3	0.1	0.5	0.6	0.5	0.8	0.9	0.2	1.6	3.8	2.1
ASIAN AMERICAN	1.1	1.4	0.9	2.1	0.9	1.0	0.5	0.7	1.1	1.5	0.8
Men	0.6	1.2	0.7	1.0	0.5	0.5	0.2	0.6	0.7	0.8	0.4
Women	0.5	0.2	0.2	1.1	0.4	0.5	0.3	0.1	0.4	0.7	0.4
AMERICAN INDIAN	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.2	0.2
Men	0.1	0.1	0.2	0.1	0.1	0.1	0.0	0.2	0.2	0.2	0.1
Women	0.1	0.2	0.1	0.1	0.2	0.2	0.2	0.0	0.1	0.1	0.1

Source: US Equal Employment Opportunity Commission

Jobs and the Economy in Hamilton County

Between 2001 and 2009, total employment in Hamilton County decreased by approximately 5%. Private sector employment declined by slightly more than 10,000 jobs and public sector employment was essentially at the same level as in 2001. As noted in the discussion of employment across the MSA, employment changes in Hamilton County went through two different phases. From 2001 to 2007 employment in Hamilton County expanded at a rate of just over 3%, but the recession led to job losses in most sectors between 2007 and 2009.

Industries contracting by more than 25% over the 2001 to 2009 period include:

- Management of Companies and Enterprises
- Manufacturing
- Transportation and Warehousing

The management sector lost nearly 70% of its jobs between 2001 and 2009, after losses greater than 75% between 2007 and 2009 wiped out significant gains made between 2001 and 2007. Other sectors especially affected by the recession include construction and administration, support and remediation services both of which experienced greater than 20% declines over the two-year period.

Industries that increased jobs between 2001 and 2009 in Hamilton County include:

- Health Care and Social Assistance
- Information
- Accommodation and Food Services
- Educational Services
- Professional and Technical Services
- Finance and Insurance

Table 9: Hamilton County employment growth by industry, 2001-2009

	2001	2004	2007	2009	01-07 Growth %	07-09 Growth %	01-09 Growth %
TOTAL	187,724	189,034	193,672	177,793	3.2%	-8.2%	-5.3%
Construction	8,139	7,734	9,148	7,271	12.4%	-20.5%	-10.7%
Manufacturing	29,990	24,342	24,425	20,723	-18.6%	-15.2%	-30.9%
Wholesale trade	6,956	7,514	7,267	6,825	4.5%	-6.1%	-1.9%
Retail trade	22,638	23,092	19,772	18,197	-12.7%	-8.0%	-19.6%
Transportation & warehousing	17,839	17,599	17,806	13,045	-0.2%	-26.7%	-26.9%
Information	2,568	2,534	3,588	3,362	39.7%	-6.3%	30.9%
Finance & insurance	12,335	12,957	13,055	12,901	5.8%	-1.2%	4.6%
Real estate & rental & leasing	2,392	2,513	2,564	2,260	7.2%	-11.9%	-5.5%
Professional & technical services	7,258	7,680	7,968	8,250	9.8%	3.5%	13.7%
Management of companies & enterprises	3,147	3,844	4,032	977	28.1%	-75.8%	-69.0%
Administration, support & remediation services	10,962	11,522	13,372	10,596	22.0%	-20.8%	-3.3%
Educational services	2,238	2,407	2,519	2,521	12.6%	0.1%	12.6%
Health care and social assistance	14,245	16,140	20,663	21,770	45.1%	5.4%	52.8%
Arts, entertainment & recreation	1,978	1,839	2,098	1,977	6.1%	-5.8%	-0.1%
Accommodation & food services	13,790	16,118	17,237	16,594	25.0%	-3.7%	20.3%
Other	31,249	31,199	28,158	14,657	-9.9%	-47.9%	-53.1%
Private Sector	163,097	163,648	168,540	153,026	3.3%	-9.2%	-6.2%
Public Sector	24,627	25,386	25,132	24,767	2.1%	-1.5%	0.6%

Source: Bureau of Labor Statistics

Of these growing sectors, three – health care and social assistance, educational services and professional and technical services – continued to grow jobs even during the 2007 to 2009 period. The health care and social assistance sector experienced both the greatest rate of increase in employment – up by 52.8% – and the greatest growth in the actual number of jobs – 7,525 – between 2001 and 2009.

Attitudes about Employment Conditions

Almost three-quarters of respondents to the 2010 Ochs Center survey respondents indicated that they considered the quality and availability of jobs in Hamilton County “fair” or “poor” – with little change from prior surveys. The percentage rating conditions as “excellent” or “good” declined from 28% in 2006 and 2008 to 22% in 2010.

Educational attainment appears to have the greatest impact on individual perceptions of the employment situation. Respondents with a high school education or less were more than twice as likely to rate the employment situation as “poor” compared to college graduates (45% vs. 20%). Similarly, 27% of college graduates rated job availability as excellent or good in the 2010 survey – down from a high of 32% in 2006, but higher than the percentage for those respondents with a high school education or less (20%) or some college (18%).

The gap between respondents with a high school education or less and college graduates rating the availability of jobs as poor grew from 13 percentage points in 2006 to 17 percentage points in 2008 to 25 percentage points in 2010.

Survey findings also indicated differences in perceptions of the job situation based on the respondent’s race. As in prior years, whites were more likely to rate the availability of jobs as excellent or good and African Americans were more likely to rate availability as poor. In 2010 though, the gap in ratings closed significantly – largely as a result of an increase in the percentage of whites rating job availability as poor. As a result, the 2010 gap based on race between those rating employment as “excellent” or “good” dropped to 6 percentage points from almost 20 percentage points in 2006.

Table 10: Employment situation rating

	2006	2008	2010
Excellent	3%	3%	3%
Good	25%	25%	19%
Fair	40%	40%	40%
Poor	28%	28%	32%
Don't Know	3%	3%	7%

Source: Ochs Center Survey of Hamilton County Residents: 2006, 2008, 2010

Table 11: Employment availability rating by educational attainment

	Excellent/ Good	Fair	Poor
2006			
High School Education or Less	27%	35%	34%
Some College	27%	40%	30%
College Graduate	32%	44%	21%
2008			
High School Education or Less	24%	39%	34%
Some College	27%	40%	29%
College Graduate	31%	42%	17%
2010			
High School Education or Less	20%	24%	45%
Some College	18%	40%	38%
College Graduate	27%	47%	20%

Source: Ochs Center Survey of Hamilton County Residents: 2006, 2008, 2010

Table 12: Employment availability rating by race

	Excellent/ Good	Fair	Poor
2006			
White	32%	42%	22%
African American	13%	34%	53%
2008			
White	32%	41%	22%
African American	13%	37%	48%
2010			
White	23%	42%	28%
African American	17%	34%	47%

Source: Ochs Center Survey of Hamilton County Residents: 2006, 2008, 2010

In 2006, women had a less favorable assessment of employment opportunity when compared to men. In both the 2008 and 2010 surveys, however, the percentage of men and women rating employment availability as excellent or good were virtually the same.

Income, Educational Attainment and Poverty

The differences in attitude about job availability in Hamilton County based on education attainment are reflected in income and poverty data.

Table 13: Employment availability rating by gender

	Excellent/ Good	Fair	Poor
2006			
Men	32%	40%	25%
Women	25%	39%	32%
2008			
Men	28%	37%	32%
Women	28%	43%	24%
2010			
Men	23%	41%	30%
Women	21%	39%	33%

Source: Ochs Center Survey of Hamilton County Residents: 2006, 2008, 2010

Table 14: Per capita income, 2000-2008

	2000	2002	2004	2006	2007	2008	Growth Rate (%)
United States	\$30,318	\$31,461	\$33,881	\$37,698	\$39,458	\$40,673	34.2
Tennessee	\$26,691	\$28,127	\$30,255	\$32,881	\$34,199	\$35,098	31.5
Hamilton County	\$30,476	\$31,657	\$33,331	\$36,490	\$37,919	\$38,460	26.2
Chattanooga MSA	\$27,462	\$28,512	\$30,074	\$32,933	\$34,225	\$34,784	26.7

Source: U.S. Bureau of Economic Analysis, accessed on line at www.bea.gov

In 2008, per capita income in Hamilton County was higher than in the MSA or Tennessee but lower than the national per capita income. Between 2000 and 2008, the per capita income rate of growth in Hamilton County trailed the nation, the State and the MSA.

Income and employment are increasingly associated with educational attainment. National unemployment data from the summer of 2009 to the summer of 2010 suggest that lower levels of education significantly increase the risk of unemployment. Nationwide, individuals without a high school diploma were approximately three times more likely to be unemployed over that time period than those with at least a bachelor's degree.

There is also a well documented gap in income based on educational attainment. As of 2007, median annual earnings for workers 25 years old and older with a college degree (\$46,805) were significantly higher than earnings for a worker with some college (\$32,874) or a high school degree (\$26,894) and more than double the median earnings of an individual without a high school diploma (\$19,405).⁶

Table 15: U.S. unemployment rate by educational attainment, 2009-2010

	July 2009	Mar. 2010	Apr. 2010	May 2010	June 2010	July 2010
Less than a high school diploma	15.3	14.5	14.7	15	14.1	13.8
High School Graduates, No College	9.4	10.8	10.6	10.9	10.8	10.1
Some college or associate degree	8	8.2	8.3	8.3	8.2	8.3
Bachelor's Degree and Higher	4.7	4.9	4.9	4.7	4.4	4.5

Source: U.S. Bureau of Labor Statistics

⁶ *Educational Attainment in the United States: 2007*, U.S. Census Bureau, January 2009 at www.census.gov/prod/2009pubs/p20-560.pdf.

Based on American Community Survey data from 2006 to 2008, 26% of county residents 25 years or older have a college degree. Whites in Hamilton County were almost twice as likely to have a college degree as African Americans and nearly one-third of men held college degrees compared to only one quarter of all women. Still, college attainment rates are increasing across gender and race.

In fact, it appears that the gender gap has reversed among younger residents, with female college attainment higher than for males in the 25-34 and the same in the 35-44 age groups. Although males in the 65 and older age group are more than twice as likely as women of that age to have college degrees, the gap in the 45-64 year old group favors males by only six percentage points.

For educational attainment in Hamilton County the greatest differences are based on place of birth. The educational attainment rate of foreign born residents 40.4%; for those born outside of Tennessee but in the US, the educational attainment rate is 33.4%. The educational attainment rate for those born in Tennessee is 19.8%.

The effects of educational attainment on income and employment explain much of the 13.5% poverty rate for individuals in Hamilton County.⁷ In Hamilton County, the poverty rate for adults without a high school degree in 2008 was more than eight times higher than for those with at least a bachelor's degree. Fewer than 4% of Hamilton County adults with college degrees lived in poverty, compared to more than 11% of individuals with only a high school degree, 8% with an associate's degree and more than 26% of individuals without a high school degree.

Table 16: Hamilton County educational attainment, 4- year or advanced degree for the universe of 25 years and older

	2000	2006-2008
African-American	10.6%	14.3%
White	26.6%	28.8%
Male	27.0%	29.0%
Female	21.2%	24.0%

Source: US Census Bureau, 2000 Census and American Community Survey data for 2006-2008

Table 17: Hamilton County college attainment by age, 2006-2008

	Total	Male	Female
Population 25 to 34 years	39,621	19,704	19,917
High school graduate or higher	86.6%	84.0%	89.2%
Bachelor's degree or higher	28.7%	26.9%	30.5%
Population 35 to 44 years	45,245	21,827	23,418
High school graduate or higher	88.2%	86.7%	89.7%
Bachelor's degree or higher	28.0%	28.0%	28.0%
Population 45 to 64 years	92,722	44,263	48,459
High school graduate or higher	88.9%	88.3%	89.4%
Bachelor's degree or higher	28.4%	31.9%	25.3%
Population 65 years and over	47,224	19,116	28,108
High school graduate or higher	73.1%	76.0%	71.1%
Bachelor's degree or higher	18.2%	25.6%	13.2%

Source: 2006-2008 American Community Survey, U.S. Census Bureau

Table 18: Hamilton County poverty status for the universe of 25 years and older, 2006-2008

	Below	Above	Total	Rate
Income in the past 12 months above/below poverty level:	22,357	199,184	221,541	10.1%
Less than high school graduate	8,292	23,892	32,184	25.8%
High school graduate (includes equivalency)	7,328	58,158	65,486	11.2%
Some college, associate's degree	4,913	59,950	64,863	7.6%
Bachelor's degree or higher	1,824	57,184	59,008	3.1%

Source: American Community Survey, U.S. Census Bureau

⁷ This rate is based on three years of American Community Survey data.

Jobs and the Economy in Hamilton County and Benchmarks

Among benchmark counties in Tennessee, Hamilton County had the lowest poverty rate and the third highest median household income in 2008. But among all eleven benchmark counties, Hamilton County had the sixth highest poverty rate and the ninth highest median household income. Among all benchmark counties, Hamilton County was sixth in unemployment in 2009 – the middle of the group. But by July 2010, Hamilton County had the third lowest unemployment rate among benchmark counties.

Worker Characteristics in Hamilton County Subregions

Local Employment Dynamics data for Hamilton County subregions describes where people work and where they live. Data are derived from Unemployment Insurance Wage Records reported by employers and maintained by each state for the purpose of administering its unemployment insurance system. The states assign employer locations, while workers' residence locations are assigned by the Census Bureau using data from multiple federal agencies. Final compilations and confidentiality protection are performed by the Census Bureau.

The Metropolitan Council in Minnesota was one of the forerunners in the use of Local Employment Dynamics data at the local level. According to the Metropolitan Council:

US Census Bureau continues to make work-in-progress refinements in processing, geocoding, and 'fuzzing' of residence area and workplace area locations. US Census Bureau applies Bayesian imputation processes to assign simulated worksite and home locations where actual locations are unknown – unknown due to either missing addresses or inability to geolocate provided addresses. The program also applies a spatial 'fuzzing' or smudging process that shifts point locations and spatial distributions, in order to avoid the disclosure of individual information.

Table 19: Benchmark county poverty, income and unemployment

County (City)	Poverty Rate	Median Household Income	Unemployment Rate		College Attainment
	2008	2008	2009 Annual	July 2010	2006-2008
Davidson (Nashville)	15.8%	\$46,780	8.9%	9.3%	32.8%
Knox (Knoxville)	13.6%	\$46,652	8.0%	7.5%	33.4%
Shelby (Memphis)	18.7%	\$45,246	10.1%	9.9%	27.5%
Madison (Huntsville)	11.6%	\$54,555	7.2%	7.3%	37.6%
Marion (Salem)	15.5%	\$46,340	10.9%	10.8%	20.7%
Ada (Boise)	8.0%	\$56,688	8.2%	8.6%	34.7%
Lehigh (Allentown)	10.2%	\$53,903	8.8%	10.1%	26.7%
Allen (Fort Wayne)	11.0%	\$49,306	10.2%	10.4%	25.7%
Richland (Columbia)	13.4%	\$49,047	9.6%	9.9%	36.5%
Forsythe (Winston Salem)	14.4%	\$47,537	9.7%	9.5%	31.0%
Hamilton (Chattanooga)	13.5%	\$46,505	9.1%	8.4%	26.3%

Sources: American Community Survey 2006-2008, Quarterly Census of Employment and Wages.

In other words, subregional data within Local Employment Dynamics may be imprecise. It remains, however, the best available source of subregional data on employment available on a timely basis.

As of 2008, five out of the thirty six subregions in Hamilton County that were each the location of more than 10,000 jobs accounted for 44.2% of all employment in Hamilton County – Downtown (18.1%), Hickory Valley/Hamilton Place (9.0%), Collegedale (5.9%), Bushtown Highland Park (5.9%) and Tyner Greenwood (5.3%).

In half of all subregions, employed residents outnumber the number of jobs located there. And in half of all subregions, the reverse is true. These data suggest the degree to which mobility is essential to workers in Hamilton County.

In 2008, jobs in the Health Care and Social Assistance sector were heavily concentrated in the Bushtown/Highland Park (28.1%) and Glenwood/Eastdale (23.5%) subregion – the location of Memorial and Park Ridge hospitals.

In 2008, Hickory Valley/Hamilton Place was the location of the highest concentration of retail employment – 26% of all retail jobs in the county. Jobs in the Accommodation and Food Services sector were most highly concentrated in the Downtown (30.5%) and Hickory Valley/Hamilton Place (17.2%) subregions.

Downtown was also home to 72.5% of all jobs in the Finance and Insurance sector and also had the highest concentration of manufacturing jobs in the county (18%).

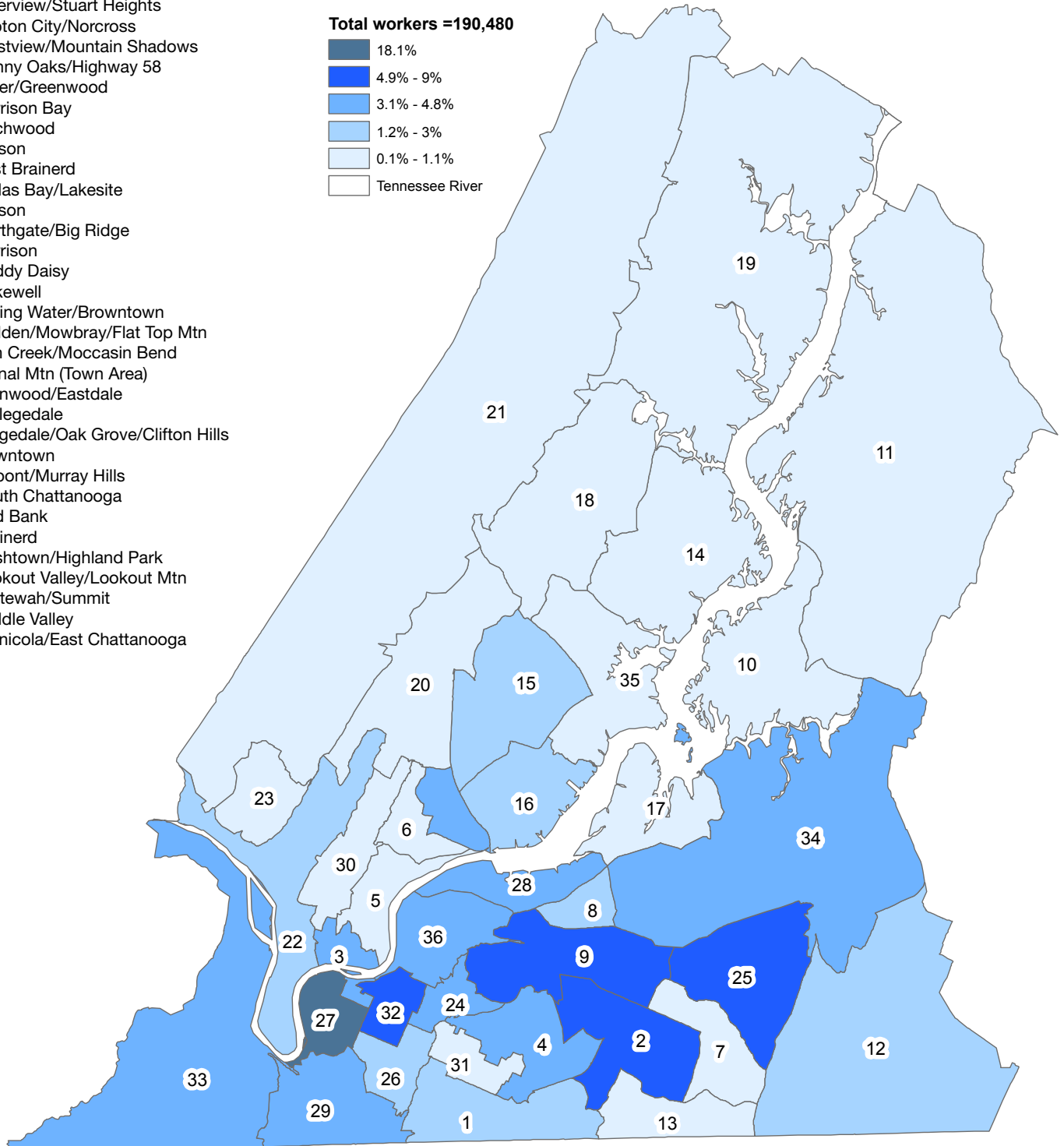
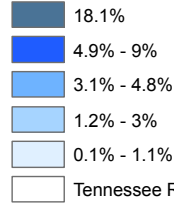
Table 20: Workers in Hamilton County by location of workplace and residence

	Workplace	%	Residence	%
East Ridge	4,586	2.4%	10,760	7.3%
Hickory Valley/Hamilton Place	17,111	9.0%	5,591	3.8%
North Chattanooga/Hill City/UTC	6,853	3.6%	2,558	1.7%
Woodmore/Dalewood	8,746	4.6%	5,817	4.0%
Riverview/Stuart Heights	562	0.3%	3,144	2.1%
Lupton City Norcross	1,231	0.6%	2799	1.9%
Westview/Mountain Shadows	708	0.4%	4,125	2.8%
Bonny Oaks/Highway 58	4,270	2.2%	3,003	2.0%
Tyner/Greenwood	10,168	5.3%	4,219	2.9%
Harrison Bay	231	0.1%	2,848	1.9%
Birchwood	223	0.1%	3,397	2.3%
Apison	4,151	2.2%	3,526	2.4%
East Brainerd	822	0.4%	4,111	2.8%
Dallas Bay/Lakesite	263	0.1%	5,196	3.5%
Hixson	4,496	2.4%	6,302	4.3%
Northgate/Big Ridge	2,777	1.5%	2,611	1.8%
Harrison	369	0.2%	3,992	2.7%
Soddy Daisy	1,934	1.0%	3721	2.5%
Bakewell	452	0.2%	2933	2.0%
Falling Water/Browntown	1,225	0.6%	3,501	2.4%
Walden/Mowbray/Flat Top Mtn	620	0.3%	3,589	2.4%
Mtn Creek/Moccasin Bend	5,313	2.8%	3,571	2.4%
Signal Mtn (Town Area)	632	0.3%	2,484	1.7%
Glenwood/Eastdale	8,167	4.3%	2,944	2.0%
Collegedale	11,188	5.9%	4,982	3.4%
Ridgedale/Oak Grove/ Clifton Hills	5,712	3.0%	3,666	2.5%
Downtown	34,433	18.1%	2,347	1.6%
Dupont/Murray Hills	8,048	4.2%	3,905	2.7%
South Chattanooga	6,453	3.4%	5,429	3.7%
Red Bank	2,124	1.1%	5,067	3.4%
Brainerd	1921	1.0%	3,838	2.6%
Bushtown/Highland Park	11,245	5.9%	3,204	2.2%
Lookout Valley/Lookout Mtn	6,799	3.6%	3,381	2.3%
Ooltewah/Summit	9,132	4.8%	6,642	4.5%
Middle Valley	490	0.3%	4,443	3.0%
Amnicola/East Chattanooga	7,025	3.7%	3,392	2.3%
TOTAL	190,480	100.0%	147,038	100.0%

Map 1: Subregion workers by place of work

- ID Neighborhood Name
- 1 East Ridge
- 2 Hickory Valley/Hamilton Place
- 3 North Chattanooga/Hill City/UTC
- 4 Woodmore/Dalewood
- 5 Riverview/Stuart Heights
- 6 Lupton City/Norcross
- 7 Westview/Mountain Shadows
- 8 Bonny Oaks/Highway 58
- 9 Tyner/Greenwood
- 10 Harrison Bay
- 11 Birchwood
- 12 Apison
- 13 East Brainerd
- 14 Dallas Bay/Lakesite
- 15 Hixson
- 16 Northgate/Big Ridge
- 17 Harrison
- 18 Soddy Daisy
- 19 Bakewell
- 20 Falling Water/Browntown
- 21 Walden/Mowbray/Flat Top Mtn
- 22 Mtn Creek/Moccasin Bend
- 23 Signal Mtn (Town Area)
- 24 Glenwood/Eastdale
- 25 Collegedale
- 26 Ridgedale/Oak Grove/Clifton Hills
- 27 Downtown
- 28 Dupont/Murray Hills
- 29 South Chattanooga
- 30 Red Bank
- 31 Brainerd
- 32 Bushtown/Highland Park
- 33 Lookout Valley/Lookout Mtn
- 34 Ooltewah/Summit
- 35 Middle Valley
- 36 Amnicola/East Chattanooga

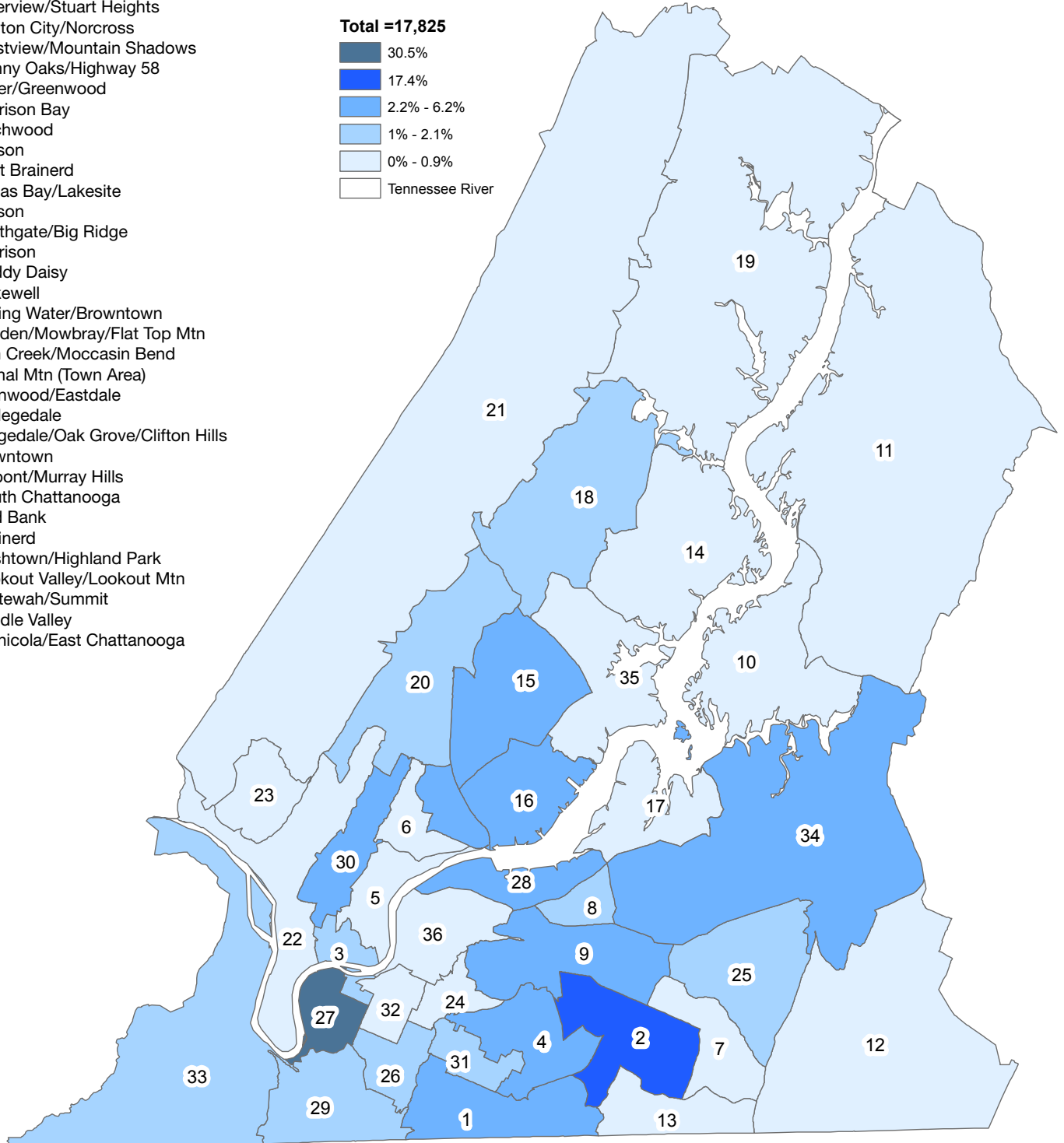
Total workers = 190,480



Source: U.S. Census Bureau, Center for Economic Studies, Local Employment Dynamics

Map 2: Distribution of accommodation and food services workers by place of work

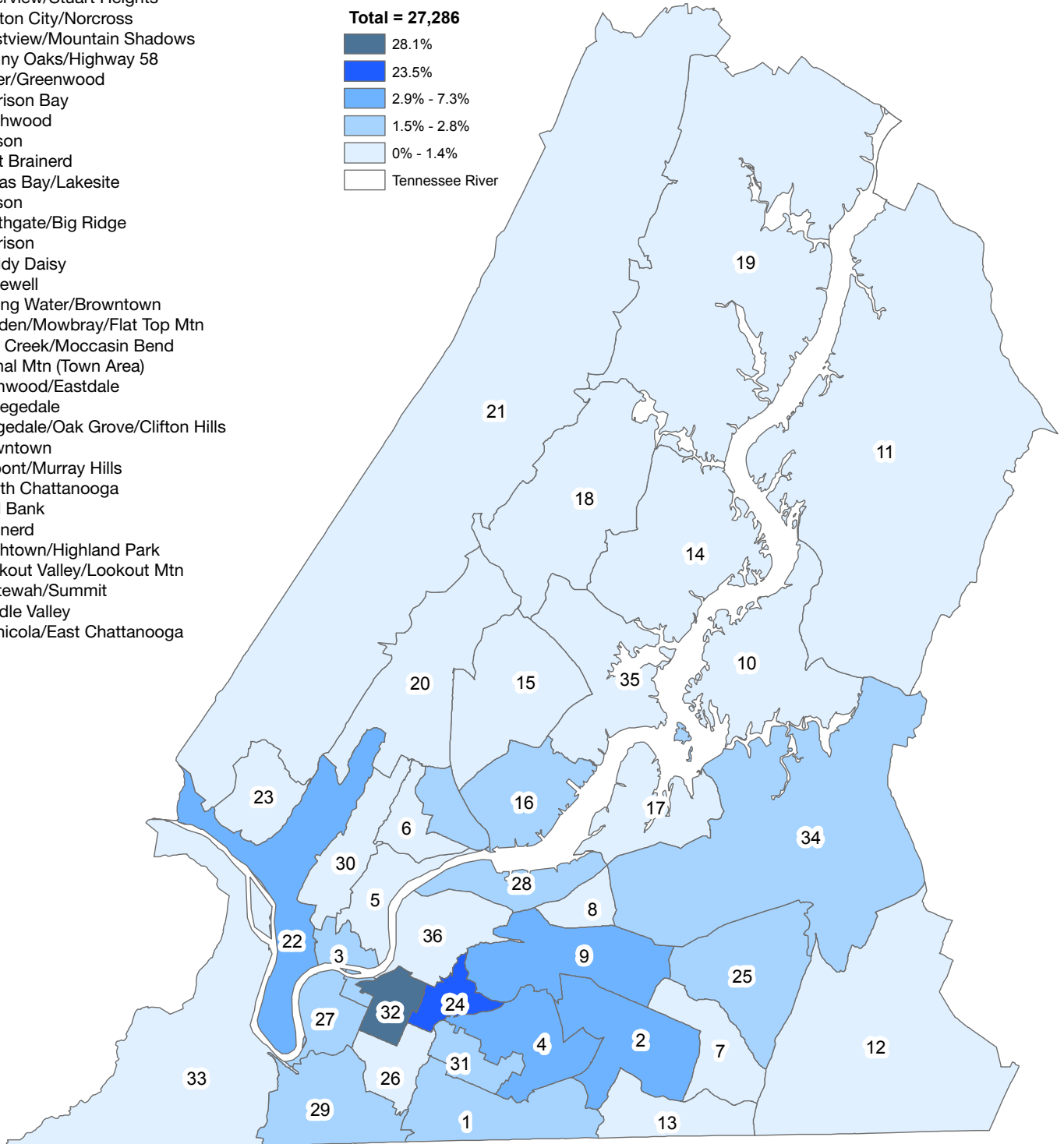
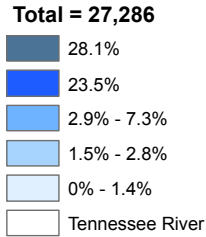
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- 26 Ridgedale/Oak Grove/Clifton Hills
- 27 Downtown
- 28 Dupont/Murray Hills
- 29 South Chattanooga
- 30 Red Bank
- 31 Brainerd
- 32 Bushtown/Highland Park
- 33 Lookout Valley/Lookout Mtn
- 34 Ooltewah/Summit
- 35 Middle Valley
- 36 Amnicola/East Chattanooga



Source: U.S. Census Bureau, Center for Economic Studies, Local Employment Dynamics

Map 3: Distribution of health care and social assistance workers by place of work

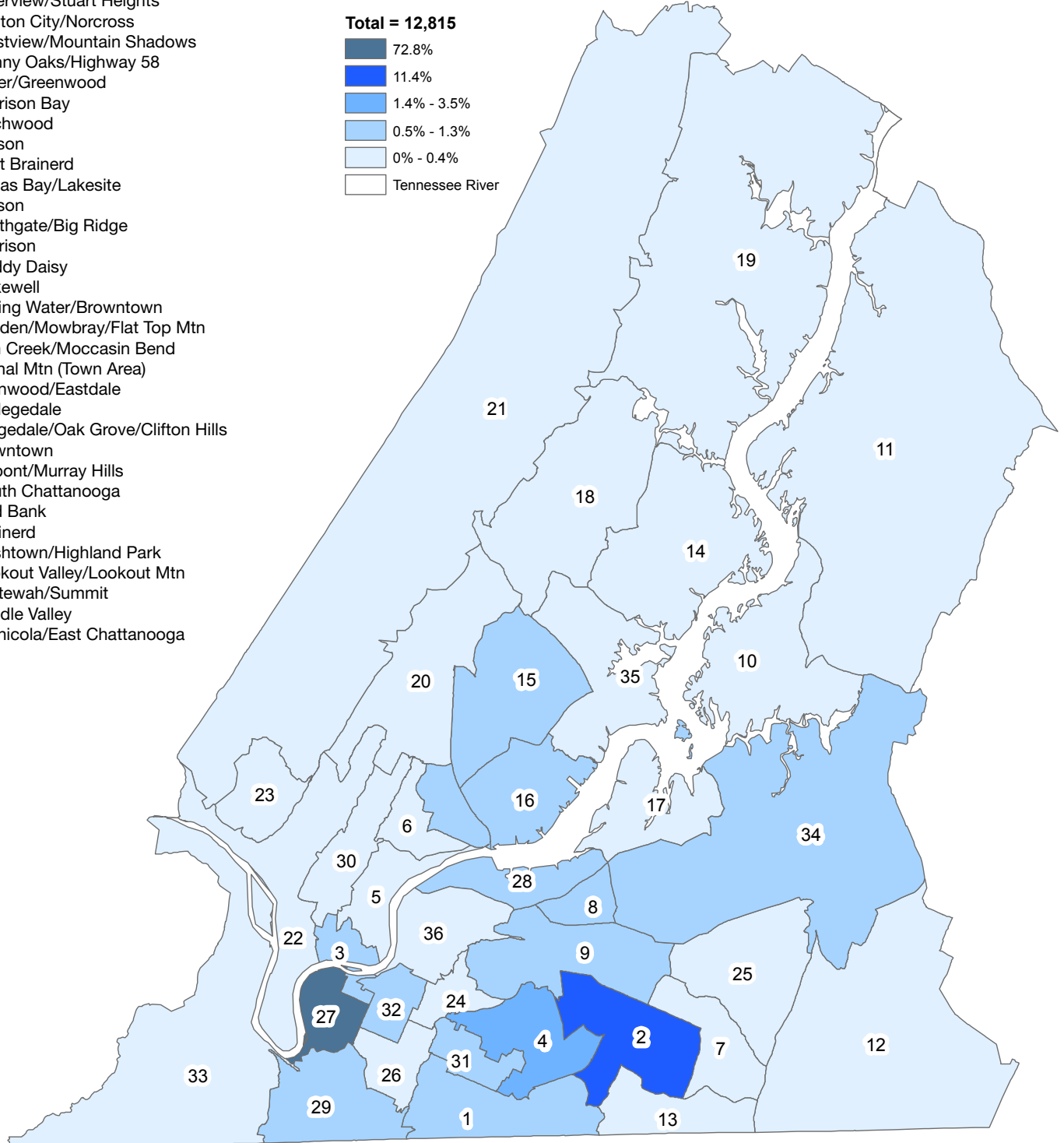
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- 29 South Chattanooga
- 30 Red Bank
- 31 Brainerd
- 32 Bushtown/Highland Park
- 33 Lookout Valley/Lookout Mtn
- 34 Ooltewah/Summit
- 35 Middle Valley
- 36 Amnicola/East Chattanooga



Source: U.S. Census Bureau, Center for Economic Studies, Local Employment Dynamics

Map 4: Distribution of finance and insurance workers by place of work

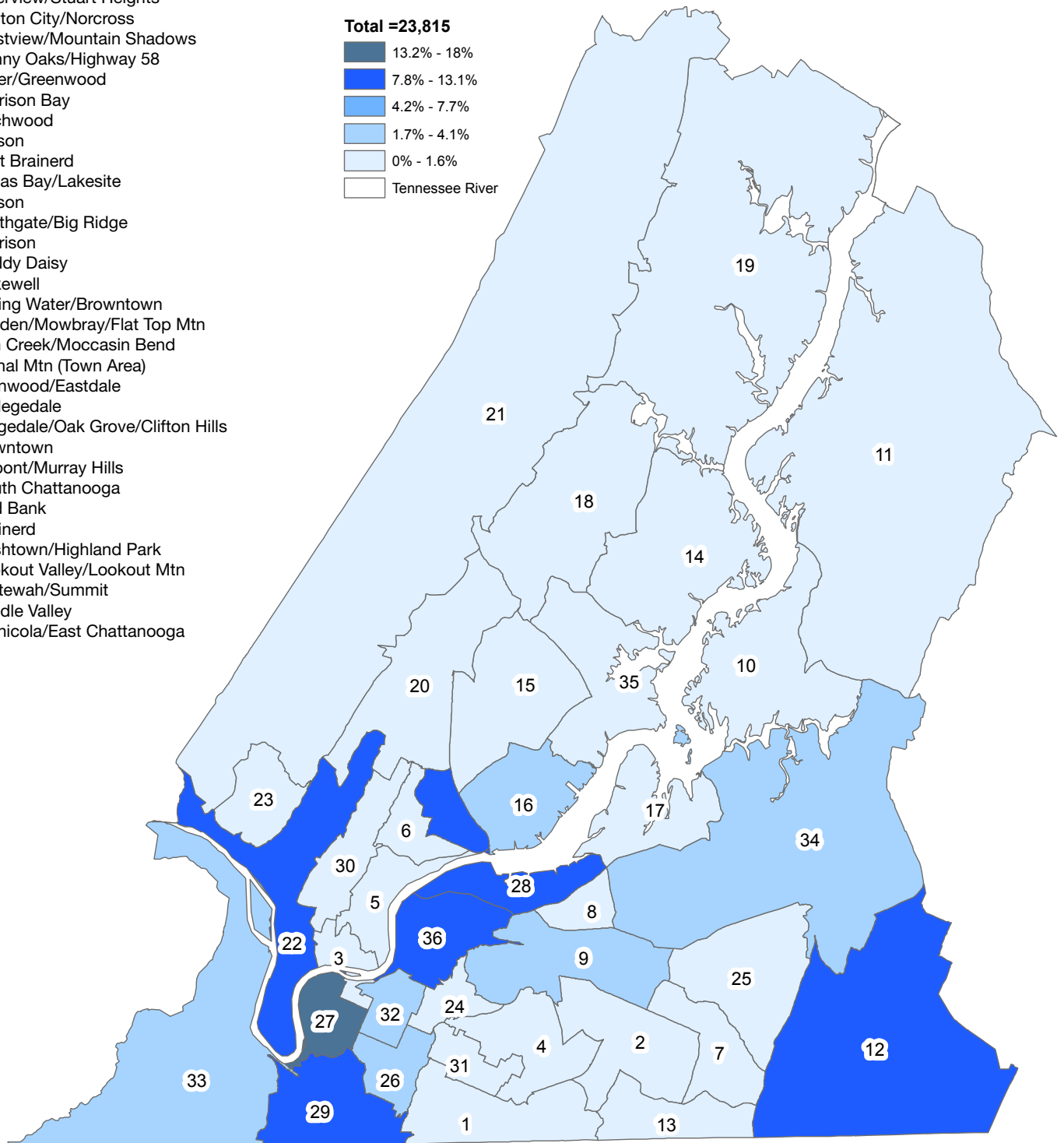
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- 33 Lookout Valley/Lookout Mtn
- 34 Ooltewah/Summit
- 35 Middle Valley
- 36 Amnicola/East Chattanooga



Source: U.S. Census Bureau, Center for Economic Studies, Local Employment Dynamics

Map 5: Distribution of manufacturing workers by place of work

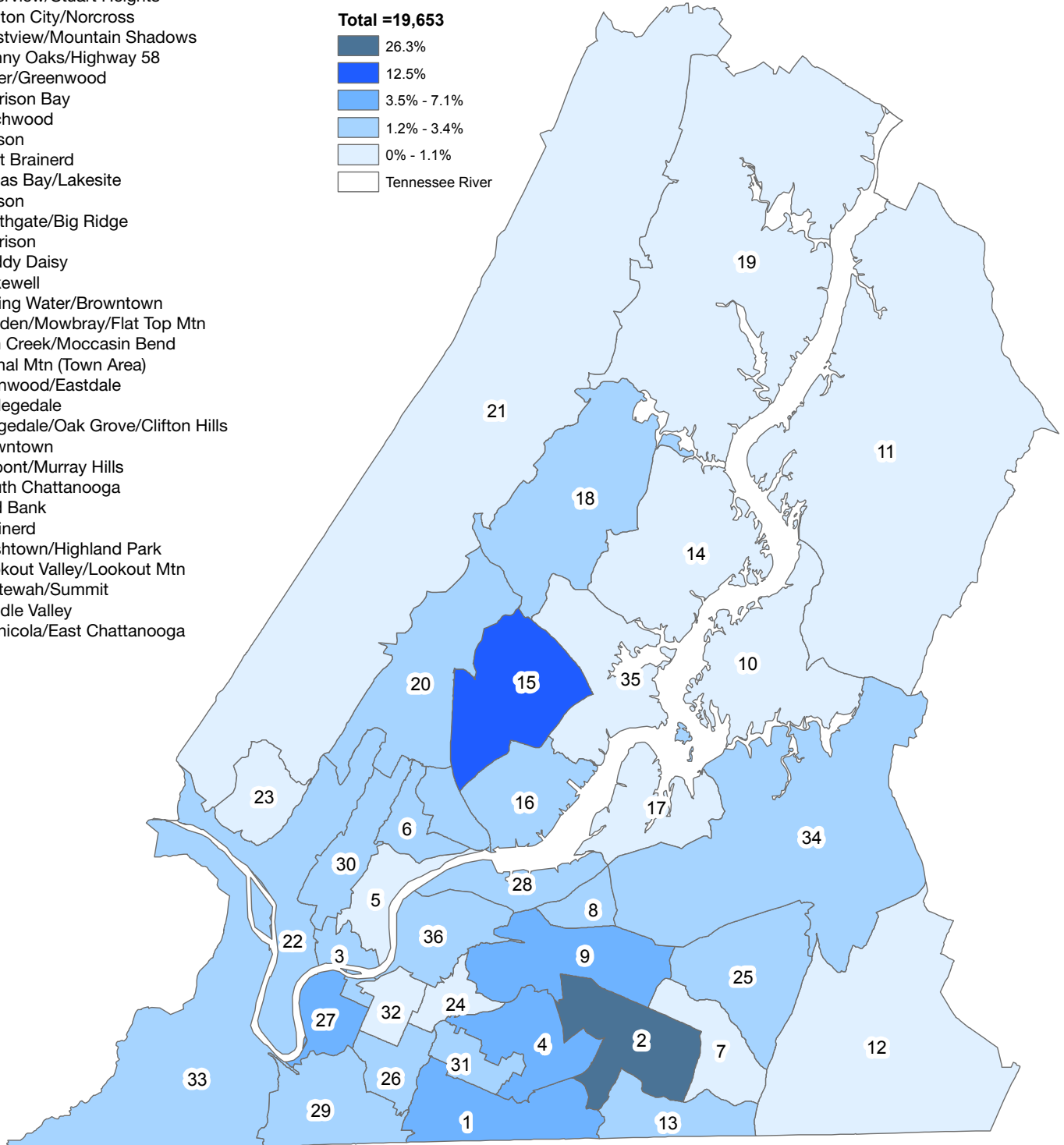
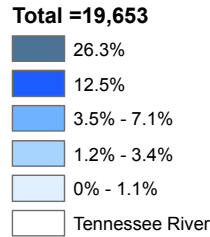
- ID Neighborhood Name
- 1 East Ridge
- 2 Hickory Valley/Hamilton Place
- 3 North Chattanooga/Hill City/UTC
- 4 Woodmore/Dalewood
- 5 Riverview/Stuart Heights
- 6 Lupton City/Norcross
- 7 Westview/Mountain Shadows
- 8 Bonny Oaks/Highway 58
- 9 Tyner/Greenwood
- 10 Harrison Bay
- 11 Birchwood
- 12 Apison
- 13 East Brainerd
- 14 Dallas Bay/Lakesite
- 15 Hixson
- 16 Northgate/Big Ridge
- 17 Harrison
- 18 Soddy Daisy
- 19 Bakewell
- 20 Falling Water/Browntown
- 21 Walden/Mowbray/Flat Top Mtn
- 22 Mtn Creek/Moccasin Bend
- 23 Signal Mtn (Town Area)
- 24 Glenwood/Eastdale
- 25 Collegedale
- 26 Ridgedale/Oak Grove/Clifton Hills
- 27 Downtown
- 28 Dupont/Murray Hills
- 29 South Chattanooga
- 30 Red Bank
- 31 Brainerd
- 32 Bushtown/Highland Park
- 33 Lookout Valley/Lookout Mtn
- 34 Ooltewah/Summit
- 35 Middle Valley
- 36 Amnicola/East Chattanooga



Source: U.S. Census Bureau, Center for Economic Studies, Local Employment Dynamics

Map 6: Distribution of retail trade workers by place of work

- ID Neighborhood Name
- 1 East Ridge
- 2 Hickory Valley/Hamilton Place
- 3 North Chattanooga/Hill City/UTC
- 4 Woodmore/Dalewood
- 5 Riverview/Stuart Heights
- 6 Lupton City/Norcross
- 7 Westview/Mountain Shadows
- 8 Bonny Oaks/Highway 58
- 9 Tyner/Greenwood
- 10 Harrison Bay
- 11 Birchwood
- 12 Apison
- 13 East Brainerd
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- 30 Red Bank
- 31 Brainerd
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- 34 Ooltewah/Summit
- 35 Middle Valley
- 36 Amnicola/East Chattanooga



Source: U.S. Census Bureau, Center for Economic Studies, Local Employment Dynamics

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