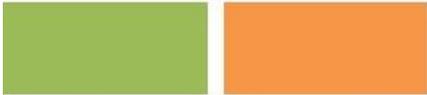




Garner Economics LLC
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A Competitive Realities Report for Clarksville and Montgomery County, Tennessee

Phase 1 Summary of the
Economic Development Action Plan

May 11, 2018

Revised and Updated July 17, 2018

Prepared for the:

Clarksville
MONTGOMERY COUNTY, TN
ECONOMIC DEVELOPMENT COUNCIL



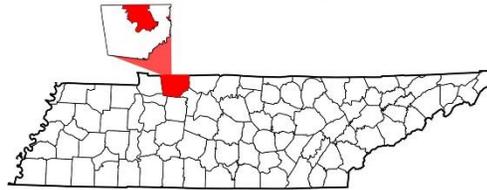
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INTRODUCTION

In February 2018, the Clarksville and Montgomery County Economic Development Council (EDC) retained Garner Economics, LLC to update its five-year Economic Blueprint—a customized, comprehensive Economic Development Action Plan that takes into account the dynamics of the Clarksville and Montgomery County market and propels the region into more high-value economic growth.

Clarksville and Montgomery County, Tennessee



The focus of this engagement is for the EDC to understand the product improvement, marketing, and potential organizational changes it must make to ensure that the County strengthens its competitive position and is able to attract and retain the types of businesses that will continue to create jobs and opportunities for the population.

Specifically, the scope of services for the overall project includes:

- A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;
- An Assets and Challenges Assessment (A&C) of the County from the perspective of a site-location consultant that facilitates investment decisions;
- Recommendations for business targets suitable for the EDC to pursue based on our research and analysis; and finally,
- A set of implementable recommendations that the leadership in the County can utilize to enhance the economic well-being of the area and make the County a desirable business location and tourist destination while sustaining and enhancing its quality of place.

This **Competitive Realities Report** (CRR) is the first of two reports. It documents the work of the first two elements of the project scope and summarizes the findings of Phase I.

Methodology

The CRR is a compilation of local facts and data points with quantitative analysis and some subjective opinions noted in the Assets and Challenges Assessment. Together, the Assets and Challenges Assessment, Community Engagement Summary, and the Economic and Labor Analysis inform this process, upon which the final strategy report and its recommendations will ultimately be built, scheduled for late June of 2018.

This CRR offers no recommendations. The final Blue Print will consist of the business target recommendations along with conclusions and recommendations for how the EDC and its partners can align business development, community development, and tourism development efforts and optimize the community’s competitive position.

PROJECT PHASES

PHASE I: DISCOVERY

Evaluate Clarksville and Montgomery County’s competitive position from an economic development perspective:

- Demographic & economic analysis
- Labor market & cluster analysis
- Tourism assets assessment
- Community Assets and Challenges Assessment (A&C)
- Compare Clarksville and Montgomery County to the state of Tennessee, the nation, and two benchmarked counties

Publish the **Competitive Realities Report** (a summary of Phase I).

PHASES II AND III: STRATEGY AND IMPLEMENTATION RECOMMENDATIONS

- Business retention and growth
- Product improvement, tourism product, and community development for the area
- Entrepreneurship
- Business recruitment and marketing
- Workforce needs

Present the final report.

Assets and Challenges Assessment

Our approach to creating the CRR began with the consulting team conducting an Assets and Challenges Assessment of the County. This was done through a windshield tour of the area and against a pre-determined list of 56 criteria used to evaluate the area from a site-selection perspective. Garner Economics assessed the County based on the qualities, elements, and infrastructure that a business will look for when considering the County as a place for its operations.

The assessment is both an objective and subjective evaluation of the area. We applied many of the same criteria to assess Clarksville and Montgomery County that we use when engaged by a corporate client to evaluate communities for possible investment. The assessment allows us to document challenges that exist in the County that constitute potential barriers for successful economic development to occur. By knowing what challenges or gaps exist, the EDC can take the steps necessary to mitigate the situation, strengthen its overall “product,” and be a more attractive business location. Likewise, by knowing its strengths, the EDC can better leverage them in its efforts to attract businesses.

The objectives of the Assets and Challenges Assessment are to:

- Help local leaders understand the area’s potential, so they can best develop realistic goals;
- Identify key strengths to emphasize in economic development marketing efforts and the area’s tourism strategy; and
- Identify key weaknesses that may limit investment in the area, so remediation of these local challenges may occur.

Stakeholder Input

As a complement to the assessment of the physical and regulatory structure of Clarksville and Montgomery County against its benchmarked peers, Garner Economics conducted four focus groups of key stakeholders in the area and distributed an electronic survey to reach the EDC’s broader stakeholders. The purpose of both exercises was to solicit a variety of perceptions of the area’s business climate, brand and destination perceptions, and areas for improvement from community stakeholders.

The following chapters describe our findings within a cohesive assessment of the region’s current state and potential. It sets the groundwork for developing strategies and recommendations to assist the EDC in providing excellent economic development, tourism development, and community development service delivery within the scope of its mission. The resulting strategy and implementation recommendations will be documented in the final report.

CHAPTER 1: STAKEHOLDER INPUT



Community input is a vital part of the strategic planning process. Feedback from stakeholders provides a context around the data accumulated in Phase I and is a way to validate conclusions made therein. Similarly, the input often raises issues or nuances that are critical to understanding the community. These insights may or may not be discernible through desktop research and on-site tours.

Given this, Garner Economics undertook two community engagement streams to better understand the economic, tourism, and community development issues facing Clarksville and Montgomery County.

Focus Groups

On March 27, 2018, Garner Economics held four focus group sessions with community leaders in Clarksville to solicit their perceptions and opinions of the area’s business climate, existing tourism assets, and economic competitiveness.

Sixty people participated in the four groups. The focus groups were organized into the following categories: *Large Employers*, *Smaller Employers/Entrepreneurs*, *Hospitality*, and *Government/Academia*. Participants were invited by the EDC. The same questions were posed to all focus groups; questions specific to the *Hospitality* sector were also posed to the *Hospitality* group. A more detailed summary and individual responses are in Appendix A.

“Our civil servants are definitely servants; they do a darn good job.”

—Focus Group Participant

Electronic Survey

Based on feedback received from the focus groups, Garner Economics developed and launched a community survey to solicit feedback from a broader group of stakeholders. The survey was open April 11–20, 2018, and was completed by 188 people. The vast majority of respondents live and/or work in Montgomery County.

Key Themes

The following summarizes the key themes emerging from the discussions and the survey results. (Note: the comments listed are specifically from focus group participants and survey respondents. Garner Economics recognizes that they may not necessarily be statements of fact, but rather opinions and perceptions.)

Mixed Business Climate

Participants and respondents in both streams hold an overall favorable opinion of the area’s business climate, with both streams ranking Montgomery County higher than Clarksville. Of the three focus groups that were asked this question, the average score given to the City of Clarksville was 3.09, and the average score given to Montgomery County was 3.79 (on a scale of 1 to 5, with 5 being a favorable business climate). Survey respondents gave ranks of 3.31 and 3.71, respectively. The respondents in the *Smaller Employers’* focus group ranked both the City and County lowest (2.61 and 3.71 respectively). The respondents in the *Large Employers’* focus group scored the City the highest (3.41), and respondents of the *Hospitality* sector scored the County highest (3.83).

FIGURE 1.1: BUSINESS CLIMATE RANKINGS



When asked to explain the reason for their rankings, focus group participants noted the lack of incentives and a perception that the zoning regulations and permitting processes are open to too much interpretation. (From the council level, participants praised the work of the staff: “Our civil servants are definitely servants; they do a damn good job.”) Representatives from companies that do not deal with new builds reported fewer problems.

For the area in general, focus group participants commented that there is a problem with executing or implementing plans. There were redundant comments from multiple focus groups that the community is “rich” in plans, but weak in execution.

Focus group participants and survey respondents also noted that the divisiveness between the city and county government is a detriment: “When you have two leadership bodies that disagree on so many things, you discourage business. They will go to other places that only have to deal with one municipality.” Participants noted that it is easier

to work with the County than the City and noted that the County tends to follow through better. Several noted that the County is more proactive and aggressive than the City.

Finally, several focus group participants noted the lack of resources (in both bodies) to make any game changing improvements and the lack of implementation “There are plans on shelves—a lot of them.” A few participants noted that recruitment of new companies seems to be the predominant focus for both the City and the County, with little (or not as much) attention given to growing or starting businesses. Focus group participants and survey respondents both feel that the business climate in Clarksville and Montgomery County is above average. Comments about the divisions between the County and City notwithstanding, both groups report that the staff within both entities are proactive and support businesses. The existence of the lodging tax was noted as being helpful.

Aging Infrastructure, Lack of Community Curb Appeal

All of the focus groups remarked that the area is in need of vitalization before it can be revitalized. They noted that most of the facilities are old and need to be renovated. The monies invested in downtown Clarksville are appreciated; however, there were several comments lamenting the lack of planning and lack of aesthetics in the community. In addition to manifesting itself in poor traffic flow, the aging infrastructure does little to positively distinguish Clarksville and Montgomery County as a destination or place for higher-end business.

Survey respondents echoed the sentiment when ranking options that inhibit businesses or visitors from locating or visiting the area.

Lack of Vision

Related to the above themes, both focus group and survey respondents frequently noted the lack of a shared vision or agreed-upon priorities for the area.

A common comment in the focus groups was that the City and County lack a single, shared focus. They note that there are several plans for several aspects of the economy, but the area has a difficult time implementing them. Some point to the lack of resources, while others point to the differing priorities of the City and County.

The lack of a shared vision is detrimental given that the area competes with other communities around the state for jobs and visitors. The focus groups discussed the lack of a unified brand for the area and how the separate identities of the County and City are not helpful. Comments around initiatives to help the community often noted the need to identify that common, unified brand.

Proactive Economic Development, More Focus on Quality

Discussion during the focus groups and within the comments provided in the survey made it clear that the gains the community has made in attracting big name manufacturers and new locates is greatly appreciated and that the community understands the tremendous impact of such activity. However, participants in the focus groups noted the need to move the economy to another level. Rather than being competitive solely in regard to costs, the focus group participants and several of the survey respondents would like to see the community begin investing and prioritizing in those areas that will improve the quality of place of the community—focusing on recruiting white-collar jobs (so as to raise average income and provide a stronger tax base) and investing in facilities that will allow Clarksville and Montgomery County to set itself apart as a tourism, conference, or amateur sports destination.

Within this discussion, focus group participants noted that the area is not fully leveraging its gig status (internet speeds) nor its proximity to Fort Campbell. While much has been done in regard to the latter, they argue that more should be done, especially in regard to retaining talent and leveraging activities on the base to support and spur private sector/business activities.

Potential Industries for Clarksville and Montgomery County

When asked what industry sectors would be a good fit for the area, participants suggested *Defense* and *Aviation-Related* industries to leverage the proximity to Fort Campbell, as well as *Technology-Related* industries to take advantage of the area's gig service. Both the focus groups and the survey respondents want the region to look to ways to balance the strong manufacturing base with more white-collar, office jobs.

A common sentiment shared in the focus groups is that while the Industrial Development Board and other economic development efforts are going well and appreciated, the area needs to move past only recruitment and look at other ways to grow the economy, e.g., entrepreneurship.

“We’re the guy that fishes in the same spot with the same bait. We catch a big fish, but, to be a good fisherman, you have to invest in your equipment and do things differently—otherwise, we’re going to only catch the same fish.”

—Focus Group Participant

Need for Private-Sector Leadership

Another key theme centered on the area’s need to find private-sector champions to help the area prioritize its efforts and focus around shared visions, as well as to make the necessary investments to help those visions become reality. Focus group participants noted that the community does a great job at studying issues and making plans, but that often it lacks the focus to implement those plans or the leadership to ensure there is adequate buy-in. Especially given the success of other comparable communities in the state, focus group participants (and a few survey respondents who left open-ended comments) suggest that now is the time for Clarksville and Montgomery County to try to leverage the energy and momentum and find those champions.

“We have a window of opportunity to leverage our young population (youngest median age county in Tennessee), technical talent (Fort Campbell separating personnel and APSU STEM graduates), fiber optic infrastructure, and competitive cost of development and cost of living to attract the investment of 21st Century companies and breed associated entrepreneurship.”

—Survey Respondent

Initiatives to Emulate and Future Economic Development Goals

In addition to initiatives that focus on strengthening the quality of the region, the most often-noted initiative was the need to address what most see as a division between the two governments in the County.

The community is proud—and rightly so—for its recent wins. However, there is a sentiment among both streams that the community now needs to focus on improving its quality, so it is not thought of or passed up as a low-cost option. This theme was carried through in discussion of the area’s strength as a tourist destination. One focus group responded that Clarksville used to be a destination and now it is a place where people just pass through. Focusing on investments that differentiate the community and support local business will work to increase that quality, as well as make the area a place where talent will want to move or stay.

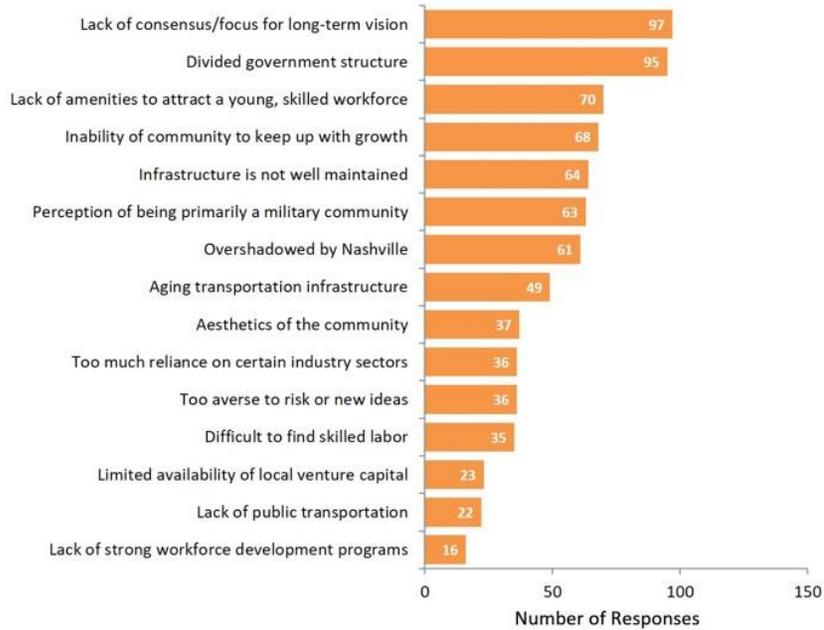
Importance of Fort Campbell

Related to the theme above, focus group participants and survey respondents commented frequently on ways to strengthen the area’s relationship and benefits from Fort Campbell. Several discussion threads noted the leadership talent that separates from Fort Campbell, as well as the asset that military spouses are to the community and workforce (however transient). Also, the *Hospitality* focus group suggested ways that Fort Campbell and the museums there could help the area strengthen its destination assets.

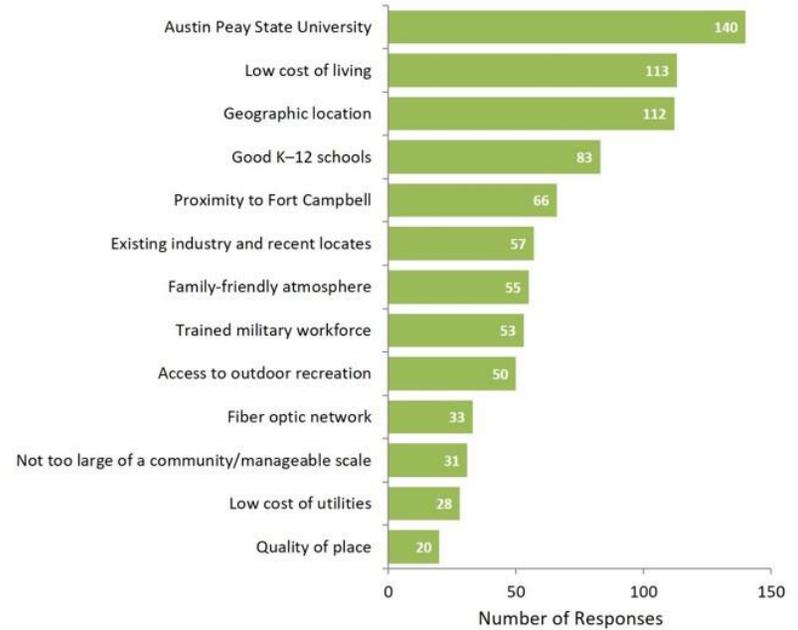
Figure 1.2 on the following page describes the perspectives of survey respondents. Appendix A provides more detail on the focus group discussions. Appendix B provides the feedback from the 188 survey respondents.

FIGURE 1.2: SAMPLE OF SURVEY RESPONSES

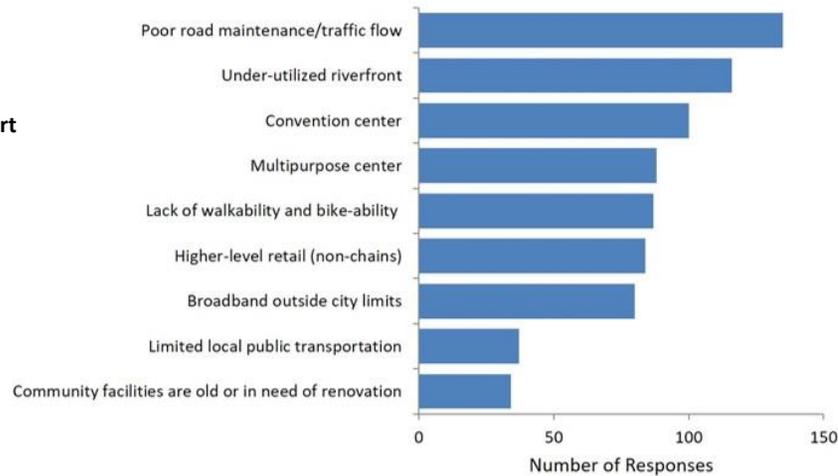
What do you think are some of the biggest obstacles that inhibit the region in its ability to attract, expand, or retain businesses and investment?



What do you see as the community's strengths?



For the purposes of this question, hard infrastructure is defined as the physical networks such as roadways, sewer, broadband internet, airports and/or ports; soft infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the healthcare system, system of government, and/or parks. What hard or soft infrastructure is weak or missing in the area?



CHAPTER 2: ASSETS & CHALLENGES ASSESSMENT

Clarksville and Montgomery County, Tennessee, offer a strong mix of assets for businesses that are contemplating relocation or expansion. Our approach in conducting the Assets and Challenges Assessment (A&C) is to employ the same criteria and methodology we use when we conduct a community evaluation for our corporate clients when exploring locations for investment. By understanding its assets and challenges from a location-strategy perspective, we believe that the County will be better positioned to compete more effectively and to resolve challenges that are likely inhibitors to investment projects. By recognizing and understanding strengths and opportunities, the City and County will continue to determine the proper target audience of companies to which it should effectively communicate the area's assets and competitiveness as a business location.

Garner Economics analyzed 56 community factors as part of the assessment. Ratings were identified by evaluating the City's position for each of the factors against the state of Tennessee, the United States, and, in many instances, the benchmarked communities of Huntsville–Madison County, Alabama, and Florence County, South Carolina. The benchmarked communities were selected by the EDC.

We define a *Neutral* rating as normal (or average) in the realm of economic development opportunity and competitiveness. An *Asset* rating indicates a positive feature of the County that would be evaluated and rated as a competitive strength versus the benchmark locations. A *Challenge* rating identifies a factor that is considered a relative deficiency compared to other locations (or from the perspective of the consultants), which should be addressed. If the challenge is not addressed, it may become an impediment to successful economic development at any time.

Of the 56 variables analyzed, 35 are considered an *Asset* for the community and 3 are considered a *Challenge* (18 are rated as *Neutral*).

The ratio of 35 Assets to 3 Challenges makes this assessment *the most positive assessment we have completed in more than 15 years.* However, any of the 3 factors rated as *Challenges* (especially the office space inventory) and 18 rated as a *Neutral* can deter or disqualify an investment decision in and for the community. The goal in the future will be for those policymakers engaged in local economic development to move the *Neutral* rankings from *Neutral* to *Asset*, mitigate the very few *Challenges*, and sustain and continue to nurture and support those elements with an *Asset* ranking.

To enable a summary overview of the A&C's main findings, the set of dashboard icons below is presented. Each finding has an accompanying icon to assist with interpretation. Readers are encouraged to review the supporting data behind each ranking in Appendix C to gain a more complete understanding of those areas.

REPORT DASHBOARD

- 
 Indicates the County is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the County.
- 
 Indicates Montgomery County is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.
- 
 Indicates the County has a worse rating for that particular factor compared to a majority of the benchmark geographies or points to a negative trend or challenge within the County.

Access to Markets

The Clarksville region is well-positioned geographically to serve local, regional, and international markets. Located on I-24 (E/W), it is also the location of Foreign Trade Zone (subzone) #78. The Montgomery County barge port also allows access to 16,000 miles of navigable waterways. It is approximately a one-hour drive time (depending on traffic conditions) to the Nashville International Airport (BNA). Four items are rated as a *Neutral* and there are no *Challenges* within this category.

Attribute	Rank
Centrally located for major regional market	 1
Centrally located for national market	 2
Well-positioned to serve international markets	 3
Interstate highways	 4
Rail service	 5
Port facilities (inland and/or water)	 6
Within 1 hour of commercial air passenger service	 7
General aviation airport capable of handling corporate aircraft	 8
Broadband availability and speeds	 9

Labor

Of the ten variables measured, seven are considered an *Asset*, with no *Challenges*. Like nearly every community in the United States, Montgomery County is experiencing shortages in certain trades and skills and with overall labor availability. But, the region has strong Location Quotients in occupations of skilled industrial workers, technicians, scientists, and managerial personnel. The County is also home to multiple academic and training institutions offering various certificates and degrees, including aviation mechanics. Austin Peay State University (APSU) is based in Clarksville and there is a robust engineering technology degree program housed at the University.

Attribute	Rank
Availability of skilled industrial workers	 10
Availability of skilled admin workers	 11
Availability of technicians, scientists	 12
Availability of managerial personnel	 13
Cost of labor	 14
Quality of labor-management relations	 15
Availability of post-secondary vocational training	 16
Availability of on-the-job training assistance	 17
Within 1/2 hour of major university/college	 18
Availability of engineering program or related programs	 19

Access to Resources

All four of the variables measured are rated as an asset. Montgomery County ranks 25 out of 95 counties in Tennessee in the value of ag products sold. There are 90 manufacturing companies in the County, according to the Bureau of Labor Statistics. There are over 500 local companies involved in *Professional, Scientific, Technical, and Administrative Services*, and finally the cost and availability of industrial/commercial electricity and gas is competitive compared to the benchmarks.

Attribute	Rank
Availability of agricultural products for food processing	 20
Availability of manufacturing processes	 21
Availability of business and professional services	 22
Cost of electricity and gas for industrial use	 23

Community Economic Development and Tourism Programs

There are 3 full-time equivalents (FTEs) for the economic development program and 6.5 for the Convention and Visitor Bureau (CVB). Based on our observations within the focus groups and feedback from the electronic surveys, both the City and County government are actively engaged in the economic development process. The private sector is involved through a program named Aspire. There was feedback from many in the focus groups that there is a disconnect between leadership with the City and County and their ability to work together effectively. The 2018 budgets for the economic development office at the EDC, and the CVB are \$1.6 million and \$1.5 million respectively.

Attribute	Rank
Adequate level of professional staff	 24
Involvement of both public and private sectors	 25
Local economic development organization has a strategic plan	 26
Level of leadership support of economic development program	 27
Level of cooperation between various organizations involved in economic development activity	 27
Level of awareness of community regarding economic development	 28
Level of funding for local economic development and CVB programs	 29

Access to Space

Of the three *Challenges* noted by Garner Economics in this entire Assets and Challenges Assessment, the lack of suitable Class A office space and sites for Class A office development is significant. This is a serious deficiency that will need to be addressed should Clarksville and Montgomery County wish to successfully attract high-end office operations, including regional or national headquarters. The community is asset-rich in its availability of fully served industrial sites. Montgomery County Business Park has provided the product many industrial clients would want to have as part of their facility requirements. The Middle Tennessee mega site is in the planning stages to offer a 1,200-acre site for a large industrial user(s).

Attribute	Rank
Availability of fully served and attractive industrial sites	 30
Availability of suitable industrial space (bldgs.)	 31
Availability of suitable Class A office space and sites for Class A office development	 32

Access to Capital

The final two *Challenges* within this assessment are within this category. The availability of low-interest loans for small business, other than through conventional banking sources, and lack of venture capital for business startups and second stage funding is a potential impediment to growing entrepreneurship in the community. The availability of tax-exempt financing for industrial facilities is an *Asset* and has been used in the community's efforts in locating certain manufacturing companies.

Attribute	Rank
Availability of tax-exempt financing for new industrial facilities	 33
Availability of low-interest loans for small business	
Availability of venture capital from local sources for business startups or early stage funding	

Government Impact on Business

Of the seven variables measured, five are considered an *Asset*. These include the availability and capacity of water/wastewater, the condition of local streets, the availability of local incentives, college prep test scores, and the quality/availability of post-secondary education. Business permitting procedures and costs and property taxes (compared to the other counties in Tennessee), are rated as a *Neutral*.

Attribute	Rank
Availability/capacity of water and wastewater treatment	 34
Condition and maintenance of local streets	
Availability and type of local incentives	 35
SAT or ACT test scores	 36
Quality and availability of post-secondary education	 37
Business permitting procedures and costs	 38
Median local property taxes (compared in state)	 39

Quality of Place

Eight of the thirteen variables are considered an *Asset*. They include the availability of executive-level and moderate-cost housing, the availability of apartments, the local cost-of-living index, the level of crime compared to the benchmarks, arts and cultural activity in the area, the availability of recreational opportunities, and the appearance of the Clarksville central business district (CBD).

Attribute	Rank
Availability of executive-level housing	 40
Availability of moderate-cost housing	 41
Availability of apartments	 42
Cost-of-living index	 43
Level of crime	 44
Level of arts and cultural activity	
Availability of recreational opportunities	
Natural disaster risk	
General appearance of the community	
Availability of adequate medical facilities	
Availability of first-class hotels, motels, and resorts	
Quality of local restaurants	
Appearance of the Central Business District(s)	

CHAPTER 3: DASHBOARD INDICATORS SUMMARY

The following analysis examines the economic position and competitiveness of Clarksville and Montgomery County located in Tennessee, north of Nashville and lying on the border of Kentucky. The Clarksville Tennessee–Kentucky Metropolitan Statistical Area encompasses Montgomery County and two counties in Kentucky: Christian and Trigg. For analysis, The Montgomery County is the primary geography analyzed, however several indicators were observed at the city or metro level due to lack of availability of county-level data.

For context, this report compares Montgomery County to itself over time, the Clarksville MSA, the state of Tennessee, the nation, and two benchmark communities. These benchmark counties either compete for economic and business development with Clarksville or are situated similarly in regard to population, military presence, and economic drivers. The two benchmark communities are:

- Florence County, South Carolina
- Madison County, Alabama (Huntsville)

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies. In all cases, the original and most current available data for all geographies (as of March 2018) are used. Garner Economics conducted all unique calculations and computations from the original data.



- Measurements
- Population Trends
 - Age Distribution
 - Diversity
 - New Residents
 - Educational Attainment
 - Secondary School Performance
 - Household & Individual Income
 - Per Capita Income
 - Poverty
 - Crime Rate
 - Cost of Living
 - Labor Force Draw
 - Labor Force Participation
 - Commuting Patterns
 - Enrollment & Degrees Granted
 - Industry Sector Composition
 - Estimated Average Annual Wage
 - Unionization
 - New Firms Startups
 - Self-Employment
 - Broadband Access
 - Military Impact
 - GDP
 - Hospitality Industry
 - Retail Demand & Leakage
 - Major Industry Sector Change
 - Industry Earnings
 - Occupational Change
 - Occupational Earnings
 - Local Specialization, Competitiveness & Growth



Demographic & Community Trends		
Population Change		Montgomery County experienced a sizable population boom, growing 24.6 percent from 2007, which added more than 39,500 residents to the County.
Age Distribution		Montgomery County shows strong concentrations in younger age groups with 63.8 percent of its population aged 39 or younger.
New Residents		Montgomery County is closely aligned with the Clarksville MSA in welcoming new residents to the area. Both had a higher percentage of their population as new to their area. Educational attainment of new residents is generally high, with 31.3 percent having a bachelor's degree or higher and 41.3 percent having some college or associate degree.
Educational Attainment		62 percent of the County's population aged 25 and older has some higher education.



Demographic & Community Trends *(continued)*

Secondary School Performance		The four-year graduation rate for Montgomery County schools is, and has consistently been, very high. The system reported a graduation rate of 95.1 percent for 2017. ACT standardized testing scores are reasonably high, with a continually increasing trend.
Household Income		Median Household Income in 2016 was \$56,112, which was in the middle of benchmark levels. Middle is a good word for Montgomery County household income, as there is a sizable spike in the percentage of income groups in the mid-range levels of \$50,000-\$99,000. Growth trends show increases in all groups above \$50,000.
Personal Income		Personal income again showed strength in the mid-range income categories reflecting the household income.
Per Capita Income		Montgomery County per capita income was \$24,535, which increased from 2011 but is growing at a slower pace than the state, the nation, and Madison County.
Poverty		Montgomery County has the lowest poverty rate across the board for both total population and children under 18.
Crime Rate		Montgomery County showed a relatively low Property Crime Rate for 2016 and a Violent Crime Rate lower than its benchmarks. The Violent Crime Rate is higher than the nation and the Clarksville MSA.
Cost of Living		Cost of Living in Montgomery County is relatively low compared to benchmarks and the national average. The only item on the index above 100—the national average—was the 109 Utilities index category.

Labor Market Analysis & Employment Trends

Labor Force Participation		Among residents aged 16 and over in Montgomery County in 2016, 64.8 percent participate in the labor force, a figure just below Madison County but higher than all other benchmarks. Unfortunately, the County is following the national trend of labor force decline between 2011 and 2016 with a loss of 2.2 percent in its labor force participation and the rate of decline is troubling.
Labor Draw		A 45-minute drive-time analysis from Clarksville showed a larger labor pool from which to recruit talent. This nearly doubles the County's labor force with an educated workforce and 13.4 percent employed in <i>Manufacturing</i> .

Labor Market Analysis & Employment Trends (*continued*)

College Enrollment & Degrees Granted		The area surrounding Montgomery County has 11 colleges offering degrees and certificates. Programs offer a variety of training with more than 20,000 students enrolled as of the 2015–16 school year. In 2016, 4,668 degrees and certificates were conferred. Additionally, the Nashville area schools boost the number of graduates in the general area by 70,000 students.
Commuting Patterns		Commuting pattern changes over the past five years have widened the net job outflow for the County. There was a 19.1 percent increase in those living and working in Montgomery County; however, the number of commuters traveling to the County for work only increased 2.5 percent.
Major Industry Composition		Montgomery County has a somewhat diverse employment base with the <i>Government</i> sector as the top employer. Nearly 29 percent are employed in <i>Retail Trade</i> and <i>Accommodation & Food Service</i> , which tend to be lower paying jobs.
Average Wage		Montgomery County’s estimated average wage is the lowest among benchmarks and exhibits a fairly flat trend over the past decade.
Unionization		The Clarksville MSA has a unionization rate of 5.8 percent and a private union membership rate of 4.8 percent. Both are higher than the benchmarks and the state. Tennessee is a right-to-work state that prohibits the use of union membership status as a condition for getting or keeping a job. A relatively higher rate may result in the perception of higher costs and negative business-worker environment.
Startups		Montgomery County and the Clarksville MSA have lower rates of startup activity and unremarkable levels of employment by new firms.
Self-Employment		As of 2016, 8.7 percent of workers in Montgomery County were self-employed, which is below all benchmarks. Self-employment decreased from 2011 to 2016 across all geographies.
Broadband		Montgomery County has good access to broadband internet with an impressive 66.5 percent of Clarksville having access to gigabit internet service. Average download speed is 28.83 Mbps, behind the nation and Huntsville.



Local Specialization, Competitiveness & Growth

Below are general observations from an in-depth analysis of industry sectors and occupational groups in Montgomery County. This information is not benchmarked.

<p>Major Industry Sector Change</p>	<ul style="list-style-type: none"> ✓ The largest absolute industry job gains in Montgomery County between 2012 and 2017 came from <i>Administrative & Support, Waste Management & Remediation Services</i>, increasing by 1,300 jobs, followed closely by <i>Government, Retail Trade</i>, and <i>Accommodation & Food Services</i>. Overall, Montgomery County shows a net increase of 6,040 jobs taking into consideration covered, non-covered, and self-employed individuals. ✓ Gains were made in most industry categories with the exception of <i>Manufacturing</i>, which lost 475 jobs; <i>Educational Services</i> (-67 jobs); and <i>Agricultural, Forestry, Fishing & Hunting</i> (-26).
<p>Industry Earnings</p>	<ul style="list-style-type: none"> ✓ Overall, the average earnings per job in Montgomery County is \$35,592, which is 32 percent below the national average of \$52,284. ✓ Earnings in the County are below national averages for all major employment sectors. ✓ Only <i>Management of Companies & Enterprises</i> was significantly lower than the national average (by 56 percent).
<p>Major Occupational Change</p>	<ul style="list-style-type: none"> ✓ Over the last five years, all but two major occupational categories in Montgomery County added jobs. The strongest job gains were in <i>Office & Administrative Support</i>, gaining 1,593 jobs; <i>Sales & Related</i>, adding 879 jobs; and <i>Food Preparation & Serving Related</i>, growing 745 jobs (Figure 7.3, Table 7.3). ✓ Other occupational groups adding at least 300 jobs over the past five years include the well paying <i>Healthcare Practitioners & Technical</i> and <i>Management</i>, with average hourly figures at \$29.39 and \$36.11 respectively. ✓ Only two occupational categories lost jobs: <i>Production</i> declined by 88 jobs and <i>Construction & Extraction</i> went down slightly, by 9 jobs.



Local Specialization, Competitiveness & Growth (<i>continued</i>)	
Occupational Earnings	<ul style="list-style-type: none"> ✓ A comparison of the same-occupation average hourly earnings for Montgomery County to the national median wage revealed only two occupations that were higher than or equal to the national average: <i>Military</i> and <i>Production</i> (Figure 7.4, Table 7.4). ✓ <i>Military</i> occupations in Montgomery County pay 70 cents higher per hour than the national rate of \$18.02, and the <i>Production</i> average wage was equal to the national rate of \$17.83 an hour. ✓ The average wage for all occupations in Montgomery County was \$18.17 compared to \$23.21 for the national average hourly wage, differing 28 percent.
Major Industry Sector Specialization & Growth	<ul style="list-style-type: none"> ✓ Major industry sector specialization focuses on the geographic concentrations of similarly classified industries. For many industry sectors there exist interconnections between suppliers, occupations, and associated supporting institutions. ✓ Five industries sectors have a local specialization above 1 and have experienced job growth in the past five years in Montgomery County. These comprise the <i>Competitive</i> category and are: <ul style="list-style-type: none"> • <i>Accommodation & Food Services</i> (LQ of 1.56) • <i>Retail Trade</i> (LQ of 1.5) • <i>Government</i> (LQ of 1.33) • <i>Real Estate, Rental & Leasing</i> (LQ of 1.17) • <i>Other Services</i> (LQ of 1.02) ✓ Industries with local specialization below 1 that had job growth within the County over the past five years are in the <i>Emerging</i> category (Figure 7.5, Table 7.5). ✓ <i>Mining, Quarrying, Oil & Gas Extraction</i> has a location quotient of 1.26 and remained flat over the past five years. Due to this lack of growth, this sector is placed in the <i>At-Risk</i> category. ✓ Three sectors are classified as <i>Declining</i> due to job loss and low local specialization: <i>Manufacturing</i>, <i>Educational Services</i>, and <i>Agriculture</i>.



Local Specialization, Competitiveness & Growth (continued)	
<p>Industry Competitiveness</p>	<ul style="list-style-type: none"> ✓ By the <i>Competitiveness</i> measure, <i>Accommodation & Food Services; Management of Companies; Administrative & Support, Waste Management & Remediation Services; Health Care & Social Assistance; Arts, Entertainment & Recreation</i> are the sectors with both local and national growth (Figure 7.6, Table 7.6). ✓ Nine other industries have local growth with the most significant sectors being <i>Government; Retail Trade; Real Estate, Rental & Leasing; and Finance & Insurance</i>. ✓ Three industry sectors had positive industry effect with national growth, but experienced local job loss. These are <i>Transportation & Warehousing; Professional, Scientific & Technical Services; and Educational Services</i>. ✓ This analysis suggests the County’s least competitive sectors are <i>Construction, Manufacturing, and Agriculture</i>.
<p>Major Occupational Sector Specialization and Growth</p>	<ul style="list-style-type: none"> ✓ Seven occupational groups are <i>Competitive</i>: <ul style="list-style-type: none"> • Education, Training & Library (LQ of 1.41) • Food Preparation & Serving Related (LQ of 1.39) • Sales & Related (LQ of 1.25) • Healthcare Support (LQ of 1.13) • Installation, Maintenance & Repair (LQ of 1.10) • Office & Administrative Support (LQ of 1.08) • Community & Social Service (LQ of 1.03) ✓ Most of the remaining occupational groups (14) are classified as <i>Emerging</i>, or having job growth with local specialization under 1. Two of these groups had job growth over 200: <i>Healthcare Practitioners & Technical and Personal Care & Services</i>. ✓ <i>Production</i> occupation is <i>At-Risk</i> and due to local job loss and an LQ of 1.27. Finally, the <i>Construction & Extraction</i> occupations are classified as <i>Declining</i> with job loss and low local specialization.

CHAPTER 4: DEMOGRAPHIC & COMMUNITY TRENDS



This chapter focuses on the residents of Clarksville and Montgomery County, Tennessee, hereafter referred to as Montgomery County. The analysis explores population demographics, new residents, educational attainment, and secondary school performance. Income for households and individuals, per capita income, and poverty rates are key indicators of residents' economic standing and are assessed. Also included in this chapter are several indicators affecting residents' quality of life and opportunity, such as crime rates and cost of living.

Population Trends

Population growth can be a significant factor in local economic health and is often a key consideration in business expansion and site-selection decisions. Population declines, very slow growth rates, or significant domestic out-migration cause companies to be wary of an area, favoring those locations that are dynamic and growing.

Montgomery County experienced a sizable population boom, growing 24.6 percent since 2007, which added more than 39,500 residents to the County (Figures 4.1 and 4.2, Table 4.1). Much of this increase occurred prior to 2012, as the past five years showed an 8.4 percent growth rate. That said, Montgomery County far outpaced all geographies compared for five- and ten-year population growth. This is second only to Huntsville, Alabama, seated in Madison County, which saw a ten-year growth rate of 14.3 percent.

Table 4.1
Net Population Change
Highest Growth Rate Shaded

Geography	2017	Change 2012–17	% Change 2012–17	Change 2007–17	% Change 2007–17
Montgomery County	200,182	15,511	8.4%	39,540	24.6%
Florence County	138,566	570	0.4%	4,809	3.6%
Madison County	361,046	18,492	5.4%	45,187	14.3%
Clarksville MSA	285,042	11,038	4.0%	22,872	8.7%
Tennessee	6,715,984	265,352	4.1%	540,257	8.7%
United States	325,719,178	11,725,906	3.7%	24,487,971	8.1%

Source: U.S. Census Bureau, Garner Economics

Figure 4.1
Population Growth in Montgomery County

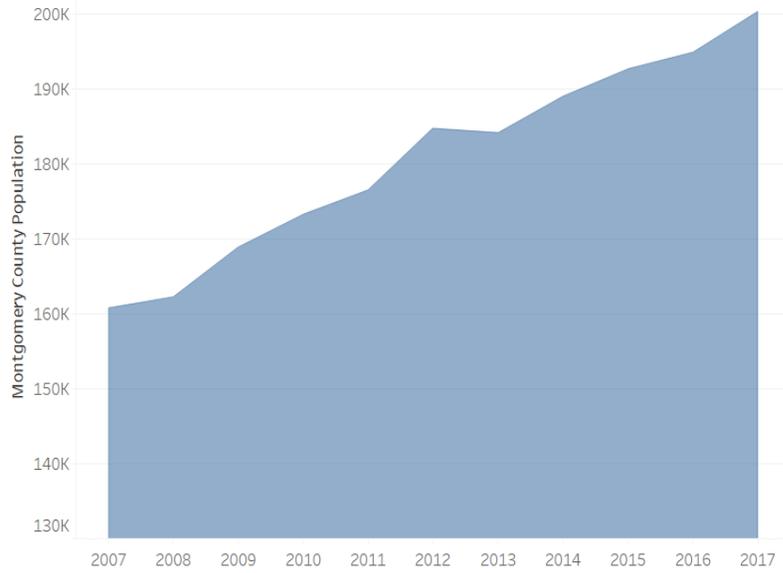
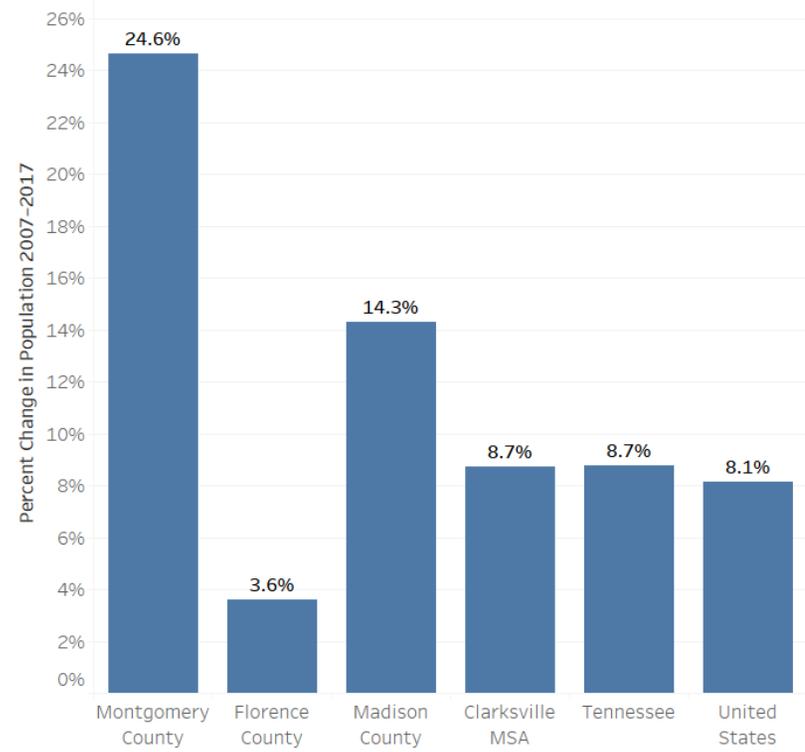


Figure 4.2
Population Growth 2007-2017



Source: U.S. Census Bureau, Garner Economics

Age

The age composition of a local population can be an important determinant in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-aged workers may prevent firms from initiating expansions requiring quick startup operations. A high proportion of older workers may indicate certain incumbent skills or the need to replace soon-to-retire workers. With the current focus on retaining and attracting talent, an existing pool of younger people for both current and future workforce participation is essential in making a community attractive for companies and people alike.

Table 4.2
Population Distribution Among Age Groups, 2016
Highest Percentage Shaded

Geography	<10 yrs.	10–19 yrs.	20–29 yrs.	30–39 yrs.	40–49 yrs.	50–59 yrs.	60–69 yrs.	70–79 yrs.	80+ yrs.
Montgomery County	16.5%	13.1%	19.1%	15.1%	12.2%	10.7%	7.6%	3.7%	2.1%
Florence County	13.4%	13.1%	12.7%	12.5%	12.7%	12.8%	12.2%	7.7%	2.9%
Madison County	12.2%	12.5%	14.1%	12.6%	13.2%	15.3%	10.6%	5.8%	3.7%
Clarksville MSA	16.4%	13.0%	19.4%	13.8%	12.0%	10.6%	7.8%	4.6%	2.4%
Tennessee	12.3%	12.9%	13.6%	12.8%	12.8%	13.5%	11.8%	6.7%	3.4%
United States	12.4%	13.1%	13.9%	13.2%	12.6%	13.5%	11.3%	6.3%	3.7%

Figure 4.3
Median Age 2016

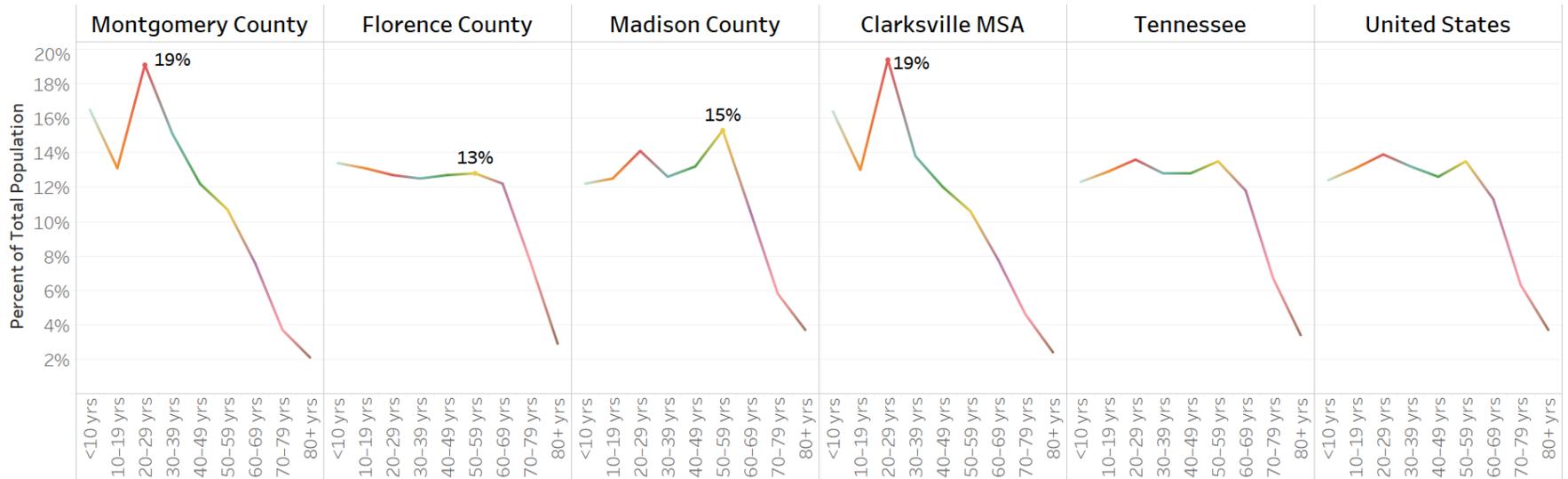
The median age of Montgomery County and the Clarksville MSA reflects the young population, with both areas having a median age of 30.8, much younger than all other benchmarks (Figure 4.3).



Source: U.S. Census Bureau, Garner Economics

Montgomery County shows strong concentrations in younger age groups, with 63.8 percent of its population aged 39 or younger (Table 4.2). The County does have a higher percentage of its population in the 30- to 39-year-old group, and the 20- to 29-year-old group is second only to the Clarksville MSA (Figure 4.4). The Clarksville MSA, which Montgomery County is a part of, has 19.4 percent of its population in this age group and Montgomery County has 19.1 percent. The presence of military is likely affecting this age group, and with Fort Campbell being, arguably, the second largest installation in the United States, it is likely having more of an effect on the community than the collective bases in Madison County, Alabama.

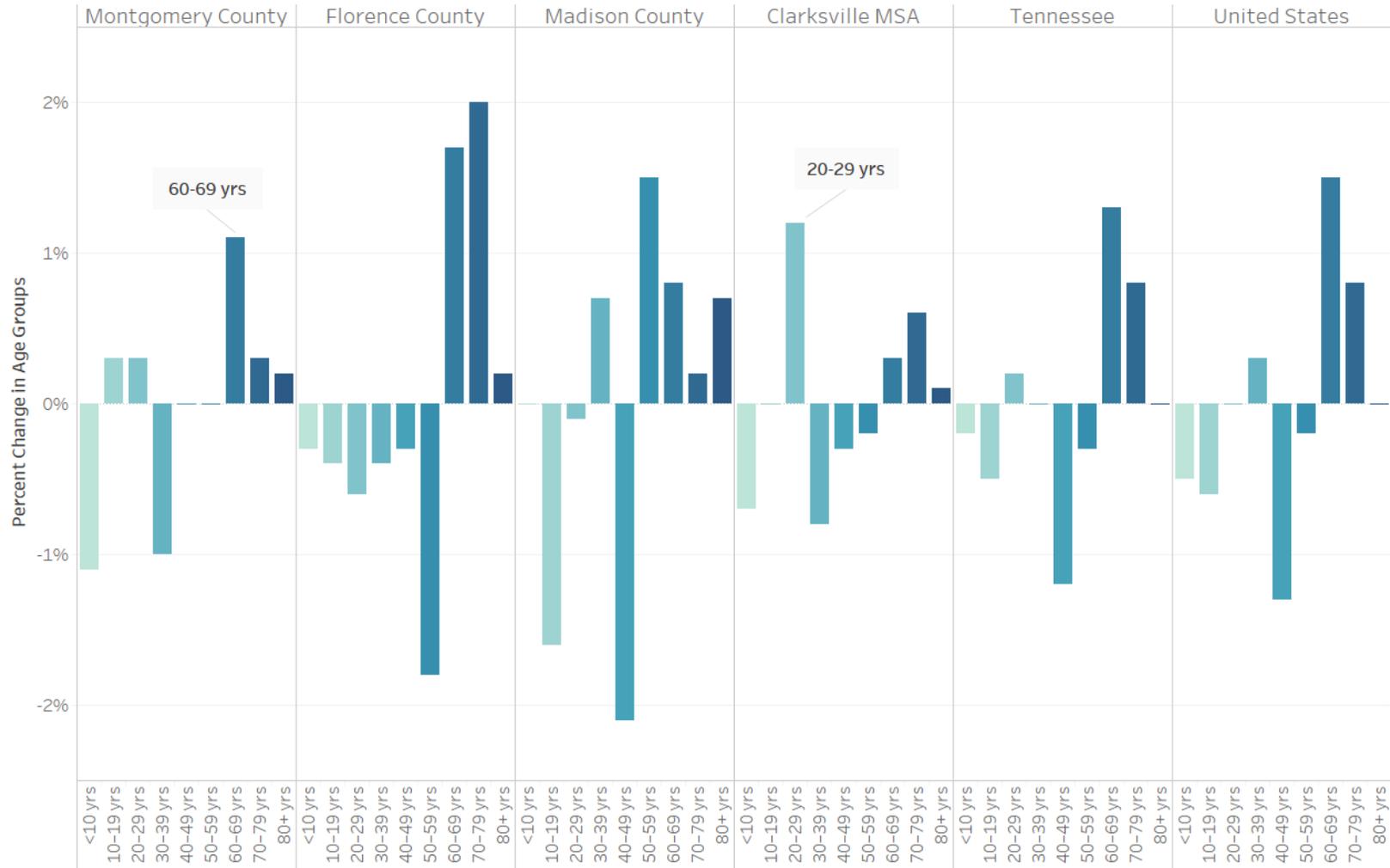
Figure 4.4
Population Distribution Among Age Groups, 2016



Source: U.S. Census Bureau, Garner Economics

Although the current population is young, the national trend of an aging population is evident when evaluating the change between 2011 and 2016 (Figure 4.5). Several younger age groups are dropping, and all groups over 70 years are growing. All benchmarks show growth in the older groups and some, such as Florence County, show a much more pronounced loss of younger people. The Clarksville MSA did show increases in the 20- to 29-year-old group, perhaps reflecting a slight geographical change in housing options for Fort Campbell.

Figure 4.5
Population Change in Age Groups
Montgomery County, 2011–2016



Source: U.S. Census Bureau, Garner Economics

DIVERSITY

Montgomery County is primarily comprised of those who identify themselves as White—72 percent of the total population (Table 4.3). The County has the highest percentage of individuals who identify themselves as being of Two or More Races and a higher percentage of Hispanic or Latino origin than other local benchmarks.

By itself, racial diversity is not a determining factor in local economic competitiveness, although some firms may prefer higher rates of diversity to attract and retain certain workers. This is particularly true for multinational firms looking to attract workers from outside the United States. As talent attraction and retention are key factors in economic development today, there is a rising awareness by some companies with strong corporate cultures regarding diversity to seek areas that reflect or support inclusiveness and tolerance among many groups of people.

Table 4.3
Population Diversity, 2016
Highest Percentage Shaded

Geography	% White	% Black or African-American	% Asian	% Other	% Two or More Races	% Hispanic or Latino of Any Race
Montgomery County	72.0%	19.3%	2.8%	2.5%	3.4%	10.0%
Florence County	54.4%	42.9%	1.3%	0.3%	1.1%	2.6%
Madison County	68.3%	24.5%	2.3%	2.1%	2.8%	4.8%
Clarksville MSA	72.4%	20.0%	2.1%	2.4%	3.1%	8.9%
Tennessee	77.8%	16.8%	1.7%	1.5%	2.1%	5.2%
United States	72.6%	12.7%	5.4%	6.1%	3.2%	17.8%

Source: U.S. Census Bureau, Garner Economics

New Residents

Attracting new residents from a diversity of outside locations can reflect the County’s broader appeal and provide an indicator of economic dynamism. This measure of new residents reflects the population that has moved within the past year. By this measure, Montgomery County has fared well as part of the Clarksville MSA, reflecting a much higher rate of attracting new residents than all other benchmarks. The MSA has 11.9 percent of its residents as new to the area while the County is slightly below that level at 11.7 percent (Table 4.4). The multi-state nature of the Clarksville MSA accounts for the high percentage of residents from a different state.

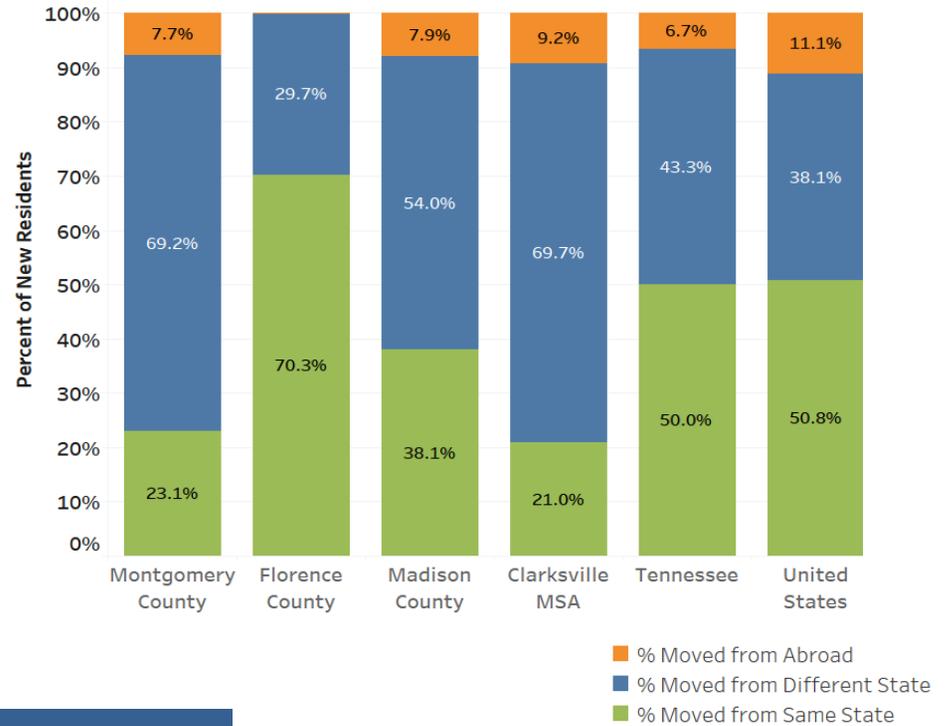
In 2016, the Clarksville MSA gained 9.2 percent of new residents from abroad, which is higher than other local benchmarks but still behind the national rate (Figure 4.6). This factor supports the international aspect of the Clarksville and Nashville MSAs with high concentrations of foreign-born individuals calling the joint metro area home.¹ Factors such as the military presence, higher education, and international firms attract an international population and add to the continued vibrancy of the area.

Table 4.4
New Residents, 2016
Highest Percentage Shaded

Geography	# Total New Residents	% New Residents	Same State	Different State	Abroad
Montgomery County	22,608	11.7%	23.1%	69.2%	7.7%
Florence County	5,061	3.7%	70.3%	29.7%	0.0%
Madison County	22,238	6.3%	38.1%	54.0%	7.9%
Clarksville MSA	33,139	11.9%	21.0%	69.7%	9.2%
Tennessee	394,857	6.0%	50.0%	43.3%	6.7%
United States	20,119,803	6.3%	50.8%	38.1%	11.1%

Source: U.S. Census Bureau, Garner Economics

Figure 4.6
Sources of New Residents, 2016



¹ Harper, Dr. Garrett. *Joint Metro Region International Community*, Nashville Area Chamber of Commerce, 2015

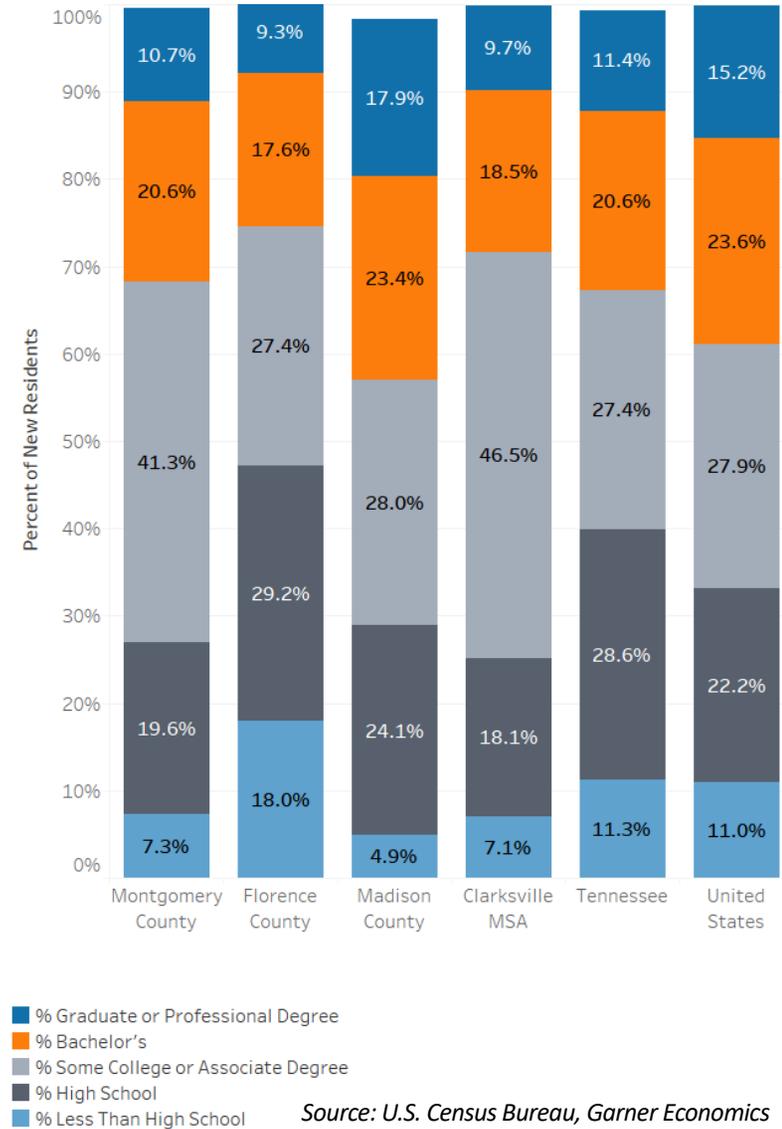
Table 4.5
New Resident Profile, 2016
Montgomery County & Clarksville MSA

	Montgomery County	Clarksville MSA
# Total New Residents 2016	22,608	33,139
% Moved from Same State	23.1%	21.0%
Median age	28.5	33.0
Median income	\$25,299	\$24,618
% Moved from Different State	69.2%	69.7%
Median age	23.7	23.9
Median income	\$26,145	\$25,737
% Moved from Abroad	7.7%	9.2%
Median age	25.0	22.5
Median income	\$24,200	\$31,150

Source: U.S. Census Bureau, Garner Economics

The new resident profile for Montgomery County and the Clarksville MSA shows an influx of younger population with lower median incomes, most likely reflecting starting wages (Table 4.5). Education levels of new residents over the age of 25 are fairly high with 31.3 percent having a *Bachelor's Degree* or higher and 41.3 percent with an *Associate Degree* (Figure 4.7). The Clarksville MSA has the highest percentage of new residents with an *Associate Degree*. Madison County leads in the *Graduate* degree category with 17.9 percent of new residents, which may be in part to the location of U.S. Space and Rocket Center in Huntsville. It is notable that the new residents are generally better educated than the existing pool shown in Figure 4.7, even after accounting for the separation of *Associate Degree* holders and those with *Some College*.

Figure 4.7
Educational Attainment, 2016
New Residents over Age 25



Educational Attainment

The level of education of the County’s population is often a decisive factor in economic competitiveness. Firms understand the need to operate in areas with a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

Educational attainment among Montgomery County’s population aged 25 and over is fairly high, with 62 percent receiving some higher education experience (Table 4.6). This is above national levels and all benchmarks, except Madison County. The County also has the highest percentage of those with *Some College* (Figure 4.8).

Figure 4.8
Educational Attainment, 2016
All Residents over Age 25

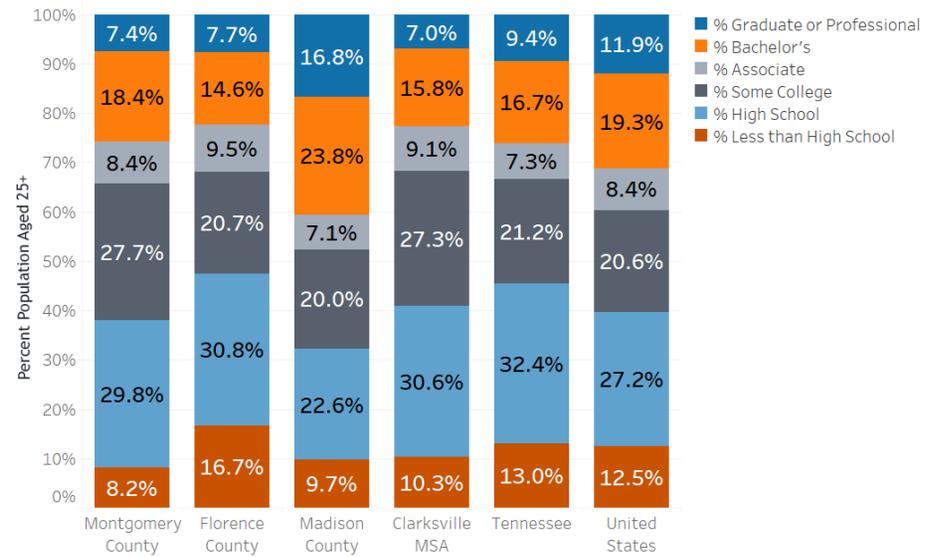


Table 4.6
New Resident Profile, 2016
Highest Percentage Shaded

Education Levels	Montgomery County	Florence County	Madison County	Clarksville MSA	Tennessee	United States
% Less than High School	8.2%	16.7%	9.7%	10.3%	13.0%	12.5%
% High School	29.8%	30.8%	22.6%	30.6%	32.4%	27.2%
% Some College	27.7%	20.7%	20.0%	27.3%	21.2%	20.6%
% Associate	8.4%	9.5%	7.1%	9.1%	7.3%	8.4%
% Bachelor's	18.4%	14.6%	23.8%	15.8%	16.7%	19.3%
% Graduate or Professional	7.4%	7.7%	16.8%	7.0%	9.4%	11.9%
Total Percentage of Population with Some Higher Education	62.0%	52.6%	67.7%	59.1%	54.6%	60.3%

Source: U.S. Census Bureau, Garner Economics

Secondary School Performance

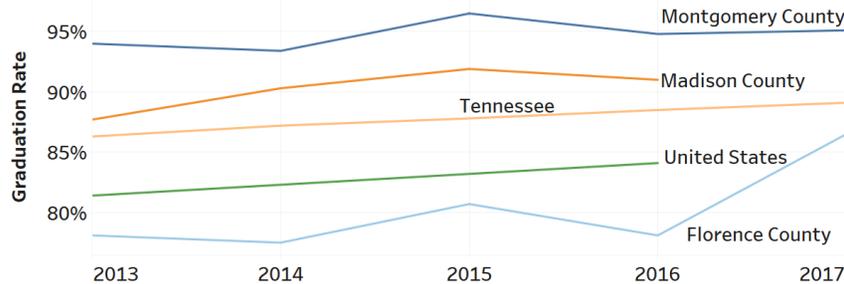
The share of high school students that graduate within four years of beginning 9th grade is an important measure of the performance of local school districts.

The four-year graduation rate for Montgomery County has been consistently above 93 percent for the past five years, well above all benchmarks (Figure 4.7, Table 4.7). Rates for 2017 were not available for the United States or Madison County; however, it is likely that Montgomery County would still rank well.

Table 4.7
4-Year Cohort High School Graduation Rates
Highest Rate Shaded

	2013	2014	2015	2016	2017
Montgomery County	94.0%	93.4%	96.5%	94.8%	95.1%
Florence County	78.1%	77.5%	80.7%	78.1%	86.5%
Madison County	87.7%	90.3%	91.9%	91.0%	n/a
Tennessee	86.3%	87.2%	87.8%	88.5%	89.1%
United States	81.4%	82.3%	83.2%	84.1%	n/a

Figure 4.9
Graduation Rates



Standardized testing is another comparative tool to reflect the performance of secondary schools. The SAT and ACT exams are standardized tests for college admissions in the United States and are widely accepted measures of education quality. These scores are especially relevant to businesses because they provide a measure of the “final product” of public schools and the educational quality.

The trend is shifting from taking SAT tests to more students taking the rival ACT test. Montgomery County had a composite score of 20.2 for 2017—higher than the state and Florence County, although slightly behind the national score (Table 4.8). Overall, the consistent level and gradual increase of Montgomery County ACT scores reflect a school system that is performing well.

Table 4.8
Composite ACT Scores
Highest Score Shaded

	2013	2014	2015	2016	2017
Montgomery County	19.5	19.6	19.4	20.0	20.2
Florence County	18.6	18.6	19.2	17.2	17.5
Madison County	n/a	n/a	19.8	21.1	n/a
Tennessee	19.1	19.3	19.4	19.9	20.1
United States	20.9	21.0	21.0	20.8	21.0

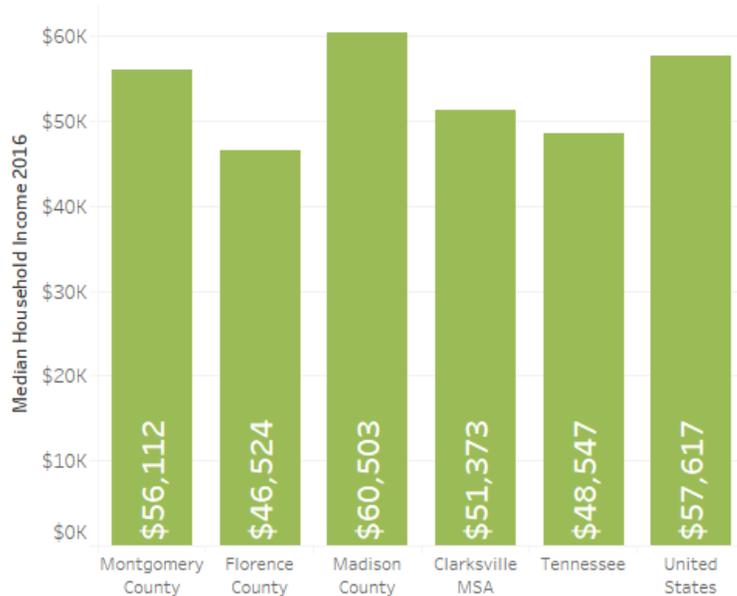
Sources: Tennessee, Alabama, and South Carolina Departments of Education; ACT; Garner Economics

National graduation rates not yet released for 2017

Household Income

Household income reflects income for residents regardless of where they work. In 2016, Montgomery County’s median household income was \$56,112—above Florence County, the Clarksville MSA, and the state (Figure 4.10). Madison County and the national median household income were higher than Montgomery County.

Figure 4.10
Median Household Income, 2016



Source: U.S. Census Bureau, Garner Economics

The County has the highest share of households with incomes in two income categories from \$50,000 to \$99,999 (Table 4.9). Overall, the statistics show Montgomery County to have robust mid-range incomes compared to the benchmarks (Figure 4.11). Growth patterns from 2011 to 2016 also show that households with incomes \$50,000 and above increased while most lower income categories shrank (Figure 4.12).

Figure 4.11
Household Income Distribution Change Montgomery County, 2011–2016

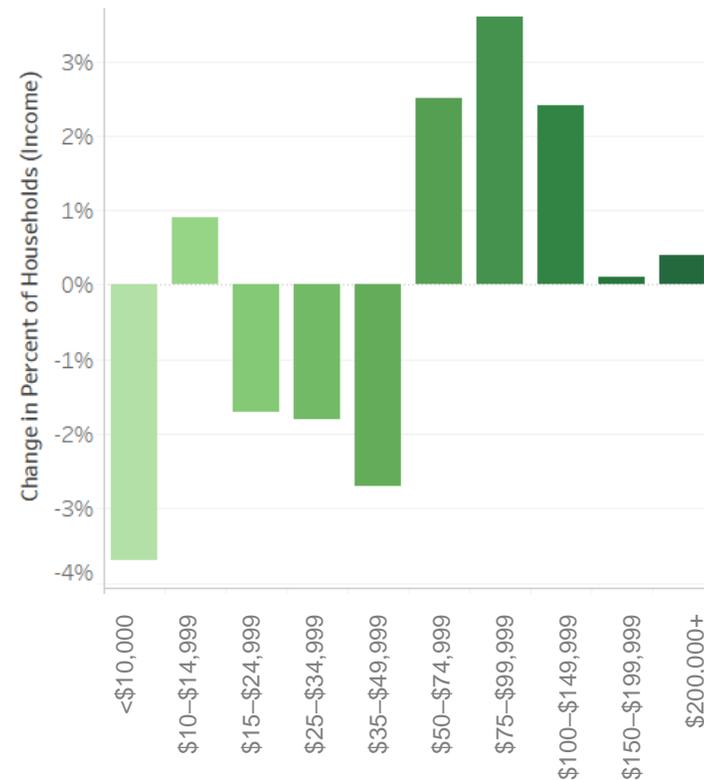
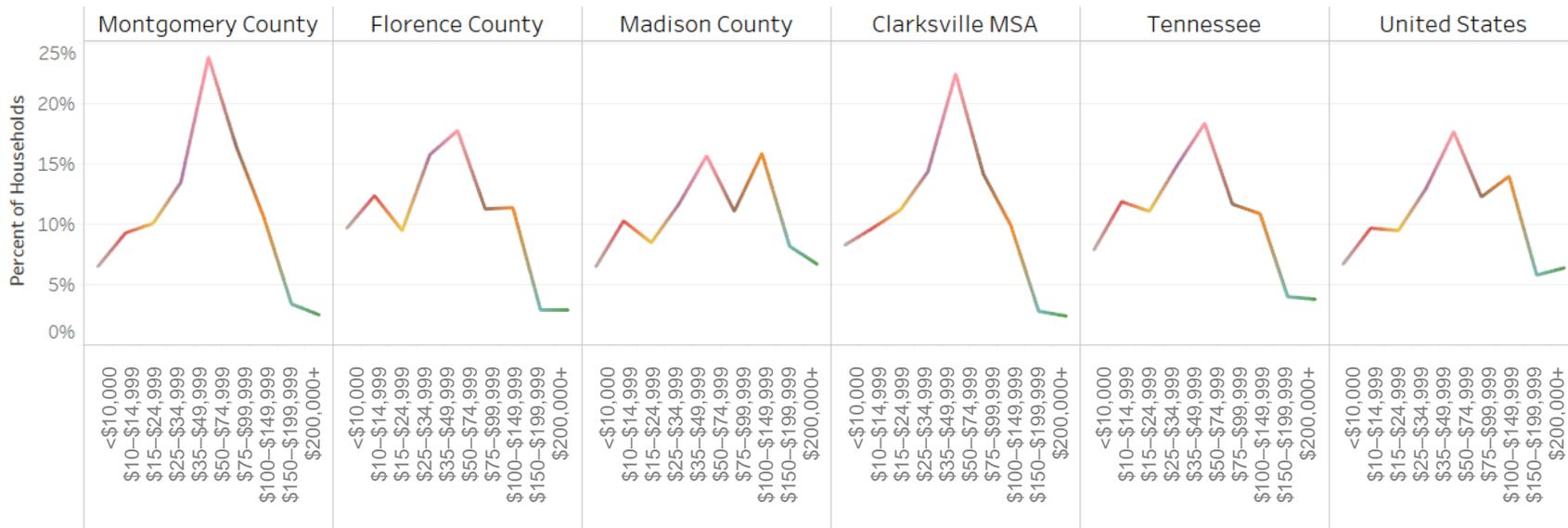


Table 4.9
Household Income Distribution, 2016
Highest Percentage Shaded

Household Income	Montgomery County	Florence County	Madison County	Clarksville MSA	Tennessee	United States
< \$10,000	6.5%	9.7%	6.5%	8.3%	7.9%	6.7%
\$10,000–\$14,999	3.7%	6.2%	5.3%	4.7%	5.4%	4.8%
\$15,000–\$24,999	9.3%	12.4%	10.3%	9.7%	11.9%	9.7%
\$25,000–\$34,999	10.1%	9.5%	8.5%	11.2%	11.1%	9.5%
\$35,000–49,999	13.5%	15.8%	11.7%	14.4%	14.9%	13.0%
\$50,000–\$74,999	23.9%	17.8%	15.7%	22.5%	18.4%	17.7%
\$75,000–\$99,999	16.5%	11.3%	11.1%	14.2%	11.7%	12.3%
\$100,000–\$149,999	10.6%	11.4%	15.9%	9.9%	10.9%	14.0%
\$150,000–\$199,999	3.4%	2.9%	8.2%	2.8%	4.0%	5.8%
\$200,000 or more	2.5%	2.9%	6.7%	2.4%	3.8%	6.4%

Figure 4.12
Household Income Distribution, 2016



Source: U.S. Census Bureau, Garner Economics

Personal Income

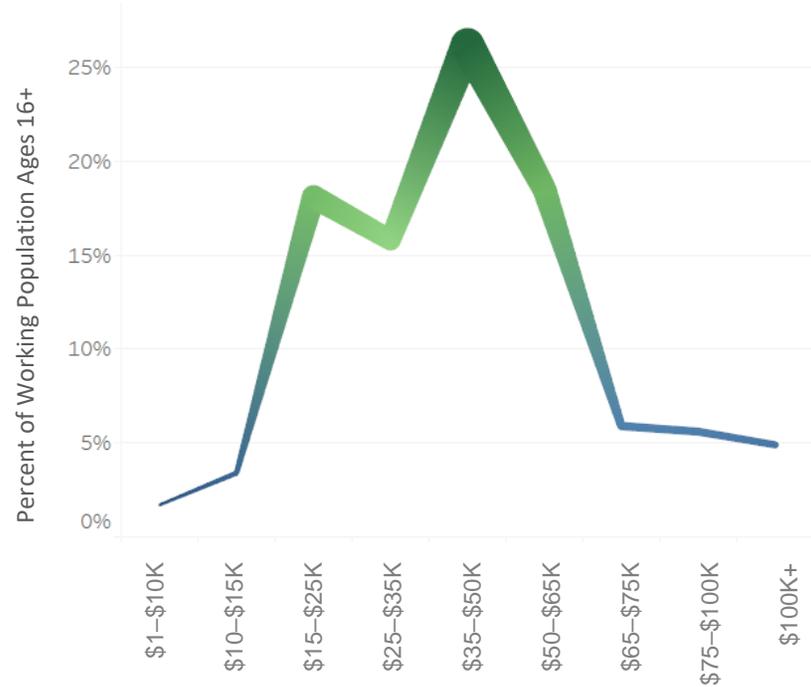
Earnings for individuals reflect the income for residents regardless of where they work or others’ earnings in their household. The data captures individuals ages 16 or over who are full-time, year-round workers with earnings.

Montgomery County’s average individual earnings of \$45,894 rank higher than Florence County and Clarksville MSA (Table 4.10). This average income falls behind the state, the nation, and Madison County, which outperforms all other benchmarks. The 2016 personal income distribution for Montgomery County shows strength in mid-range levels with the highest concentration in the \$30,000–\$49,999 range, as illustrated in Figure 4.13.

Table 4.10
Average Personal Income
Highest Relative Figure Shaded

	2011	2016	% Change in Personal Income
Montgomery County	\$48,060	\$45,894	-4.5%
Florence County	\$45,073	\$46,771	3.8%
Madison County	\$58,546	\$67,245	14.9%
Clarksville MSA	\$45,345	\$44,559	-1.7%
Tennessee	\$49,479	\$53,535	8.2%
United States	\$56,405	\$62,193	10.3%

Figure 4.13
Personal Income Distribution
Montgomery County, 2016



Source: U.S. Census Bureau, Garner Economics

Per Capita Income

Per capita income is the average annual income computed for every man, woman, and child. It is derived by dividing aggregate income by total population. Per capita income is a measure for all residents regardless of where they work, their age, or whether they derive any income.

Montgomery County’s 2016 per capita income was higher than Florence County and the Clarksville MSA but lower than Madison County, the state, and the nation (Table 4.11).

Table 4.11
Per Capita Income
Highest Relative Figure Shaded

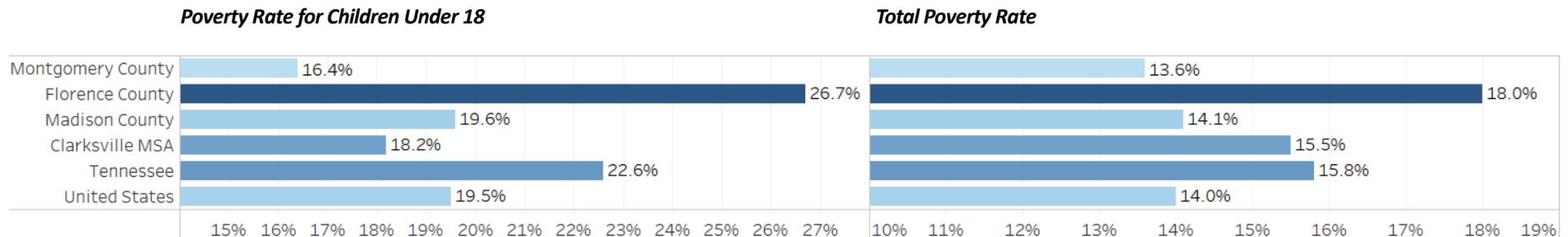
	2011	2016	% Change in Per Capita
Montgomery County	\$21,796	\$24,535	12.6%
Florence County	\$21,157	\$23,748	12.2%
Madison County	\$30,009	\$35,192	17.3%
Clarksville MSA	\$20,747	\$23,295	12.3%
Tennessee	\$23,320	\$27,087	16.2%
United States	\$26,708	\$31,128	16.5%

Source: U.S. Census Bureau, Garner Economics

Poverty

The measurement of poverty in the County helps to evaluate the well-being of the citizens and the state of the economy. Montgomery County has the lowest poverty rate across the board for both total population and children under 18 (Figure 4.14).

Figure 4.14
Poverty Rates, 2016



Source: U.S. Census Bureau, Garner Economics

Crime

Crime rates may seem outside the typical measures of economic competitiveness, but these represent a widely accepted, objective gauge used by firms. Crime rates may reflect underlying economic conditions and may signal deeper systemic problems more so than standard economic measures show.

Montgomery County’s property crime rate is relatively low. The 2,317 crimes reported per 100,000 persons is slightly higher than the Clarksville MSA but lower than all other benchmarks (Figure 4.15, Table 4.12). The violent crime rate, 540.6 crimes reported per 100,000 persons, is again higher than the metro area as well as the national rate.

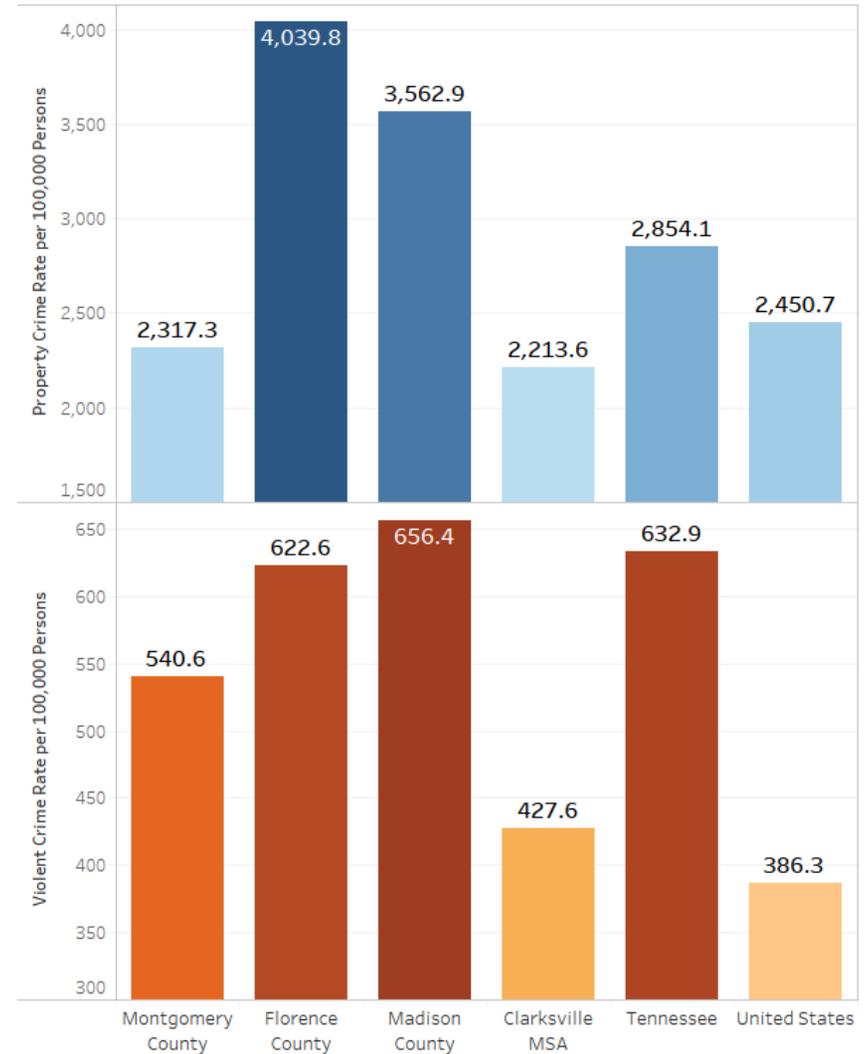
For a unilateral view of crime rates, research is based on crimes reported and published in the *FBI Uniform Crime Report* for 2016. Montgomery County’s rates include the Montgomery County Sheriff’s department, the City of Clarksville Police Department, and the police force on Austin Peay’s campus.

Table 4.12
Crime Rates
Lowest Rate Shaded

	Property Crime		Violent Crime	
	Crimes Reported	Crime Rate	Crimes Reported	Crime Rate
Montgomery County	4,514	2,317.3	1,053	540.6
Florence County	5,593	4,039.8	862	622.6
Madison County	12,695	3,562.9	2,339	656.4
Clarksville MSA	6,311	2,213.6	1,219	427.6
Tennessee	189,835	2,854.1	42,097	632.9
United States	7,919,035	2,450.7	1,248,185	386.3

Sources: Uniform Crime Reports, FBI, Garner Economics

Figure 4.15
Crime Rates, 2016



Cost of Living

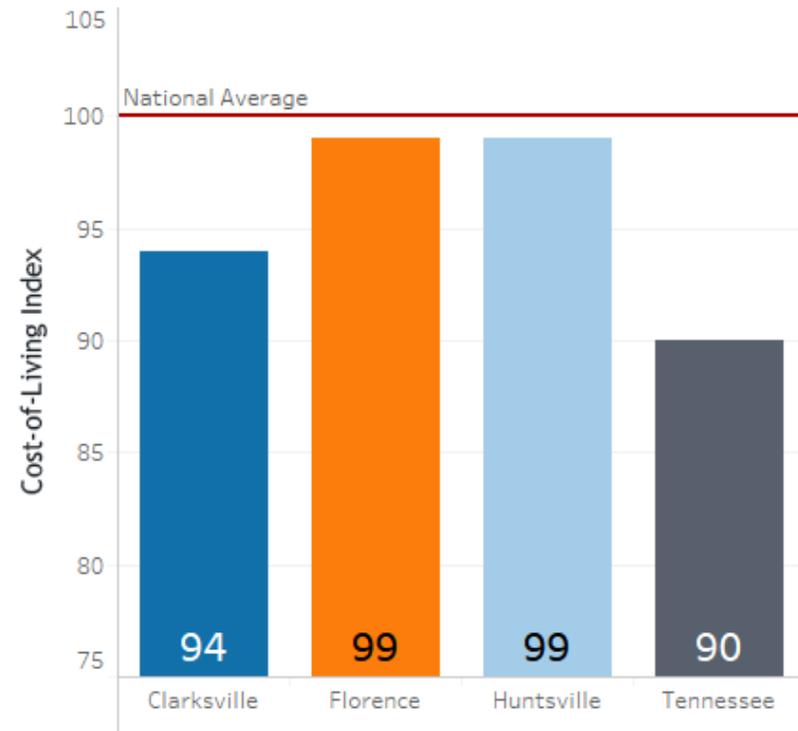
Generally speaking, Montgomery County has an affordable cost of living compared to the other communities. Cost-of-living indicators for cities within each county reflect the general cost of mid-management level living in that area. The Cost-of-Living Index uses the national average of 100 for measuring the cost for a set basket of goods and services.

The composite Cost-of-Living Index for the City of Clarksville is 94 compared with 99 for both Florence and Huntsville and a national average of 100 (Figure 4.16, Table 4.13). The state of Tennessee had the lowest cost of living. Clarksville ranked below national levels for all measures with the exception of *Utilities*, which is 109.

Table 4.13
Cost-of-Living Index, 2017
Lowest Figure Shaded

Category	Clarksville	Florence	Huntsville	Tennessee
Cost-of-Living Index	94	99	99	90
Goods & Services Index	99	106	107	97
Grocery Index	100	106	96	93
Healthcare Index	92	95	97	89
Housing Index	81	82	88	80
Transportation Index	95	92	95	90
Utilities Index	109	127	110	95

Figure 4.16
Cost of Living Index, 2017



Source: AreaVibes.com derived from C2ER Index for 2017, Garner Economics

CHAPTER 5: ECONOMIC DYNAMICS & EMPLOYMENT TRENDS



This chapter focuses on the labor market of Montgomery County, Tennessee, beginning with the residents within the County, then exploring commuting patterns with the surrounding area and the full labor force draw of a 45-minute drive-time from the city of Clarksville. The data then transitions to employer-based information, including employment, industry composition, wage comparisons, and additional workplace statistics for those working in Montgomery County.

Labor Force Participation

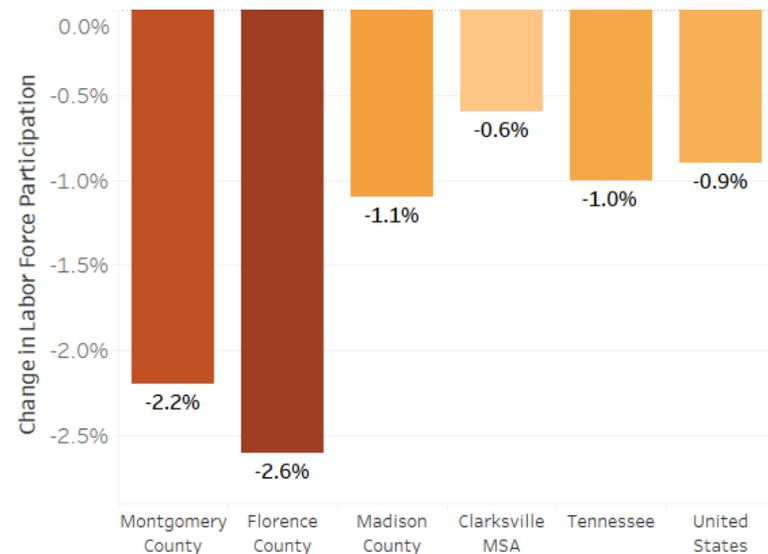
Among residents aged 16 and over in Montgomery County in 2016, 64.8 percent participated in the labor force, a figure just below the Madison County but higher than all other benchmarks (Table 5.1). At 67 percent, the County’s 2011 participation rate was the highest of this grouping.

Unfortunately, the County is following the national trend of labor force decline between 2011 and 2016 with a loss of 2.2 percent in its labor force participation (Figure 5.1). Florence County had a steeper decline than Montgomery County; however, the rate of decline is troubling.

Table 5.1
Labor Force Participation Rate
Highest Rate Shaded

	2011	2016	2011–2016 Change
Montgomery County	67.0%	64.8%	-2.2%
Florence County	61.8%	59.2%	-2.6%
Madison County	66.6%	65.5%	-1.1%
Clarksville MSA	63.9%	63.3%	-0.6%
Tennessee	61.6%	60.6%	-1.0%
United States	64.0%	63.1%	-0.9%

Figure 5.1
Change in Labor Force Participation, 2011–2016



Source: U.S. Census Bureau, Garner Economics

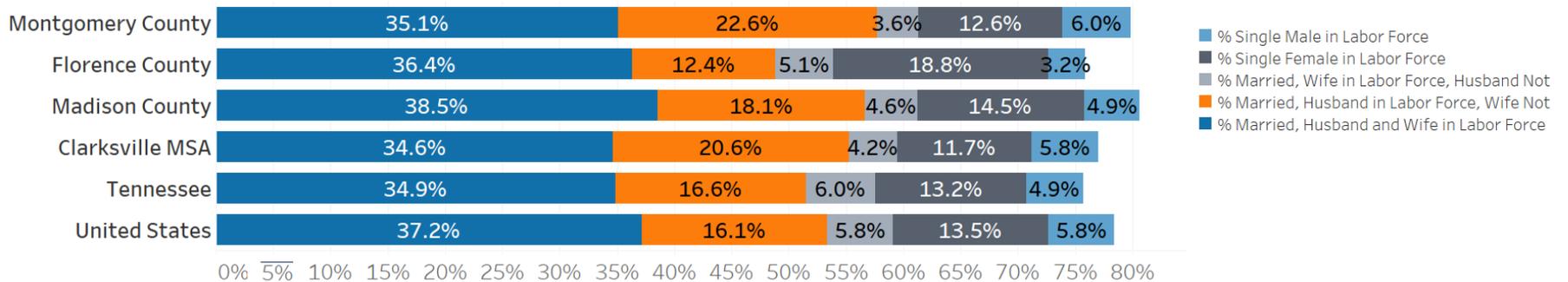
Labor Force Participation—Families

Among all families in Montgomery County, 35.1 percent have two income earners (*Married, Husband and Wife in Labor Force*) which is the biggest sector of families in the labor force (Figure 5.2, Table 5.2). The County has the highest share of married families with one income in the *Married, Husband in Labor force, Wife Not* category at 22.6 percent, as well as the highest share of *Single Male in Labor Force* at 6 percent. Overall, the participation rate of families in Montgomery County is higher than the nation, the state, and all other benchmarks except Madison County.

Table 5.2
Labor Force Participation of Families, 2016
Highest Rate Shaded

	Montgomery County	Florence County	Madison County	Clarksville MSA	Tennessee	United States
Married Couple Families						
Married, Husband and Wife in Labor Force	35.1%	36.4%	38.5%	34.6%	34.9%	37.2%
Married, Husband in Labor Force, Wife Not	22.6%	12.4%	18.1%	20.6%	16.6%	16.1%
Married, Wife in Labor Force, Husband Not	3.6%	5.1%	4.6%	4.2%	6.0%	5.8%
Other Families						
Single Female in Labor Force	12.6%	18.8%	14.5%	11.7%	13.2%	13.5%
Single Male in Labor Force	6.0%	3.2%	4.9%	5.8%	4.9%	5.8%
Total Families in Labor Force	79.9%	75.9%	80.7%	77.0%	75.7%	78.4%

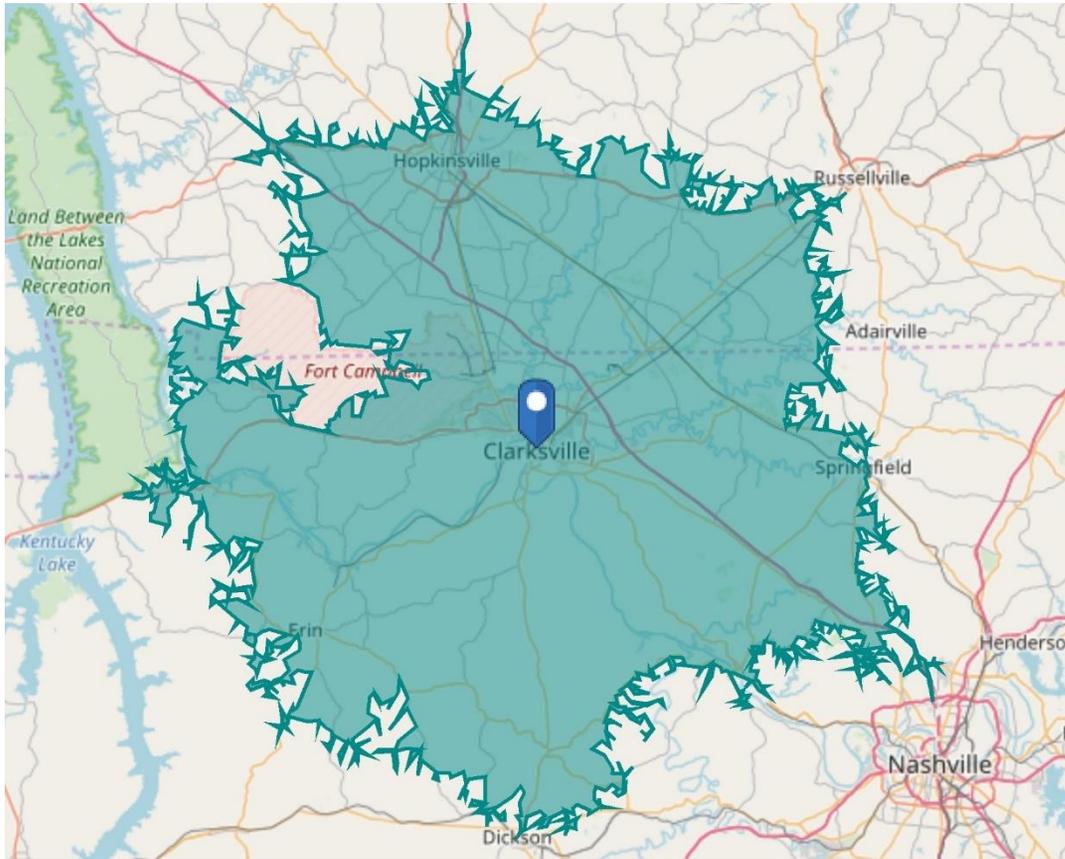
Figure 5.2
Labor Force Participation of Families, 2016



Source: U.S. Census Bureau, Garner Economics

Labor Force Draw

Figure 5.3
Montgomery County Labor Draw
45-Minute Drive-Time Area



Source: ESRI, 2017 data; Garner Economics

The effective labor draw considers the documented labor pool for a location based on the existing residential workforce and local road network. The analysis considers the pool of active workers residing within representative drive-time from a site.

Using a 45-minute drive-time analysis from the city of Clarksville, the estimated 2017 population is 355,353 (Figure 5.3). This area has 55.6 percent of its population with at least some college or secondary degree.

The drive-time analysis nearly doubles the County's labor force to 152,871. Of this workforce, 13.4 percent are employed in the *Manufacturing* sector.

355,353

Population

55.6%

Some Higher Education

152,871

Labor Force

13.4%

Manufacturing Employment

College Enrollment & Degrees Granted

As important as the existing workforce, those who will join the ranks of the labor force with degrees or certifications enhance the opportunity for companies to relocate or expand in the area. Within the 45-minute drive-time and general vicinity are 11 colleges and universities with nearly 21,000 students reported as enrolled for the 2015–2016 school year (Figure 5.4, Table 5.3). Additionally, it is important to note that the higher education assets in neighboring Nashville also provide a boost to the number of students in the greater area with a wider variety of schools and programs. In Davidson County alone, there are more than 70,000 students and 15,000 in graduate studies.

Schools within the 45-minute drive-time granted 4,668 degrees or certificates in 2016. These were distributed fairly equally among the certificate, associate, and bachelor’s level (Table 5.4). The top fields of study awarded include *Health Professions, Liberal Arts, Business Management, and Mechanic and Repair Technologies* (Table 5.5)

Table 5.3

**Montgomery County Labor Draw
Enrollment by College, 2016**

Name	City	Enrollment
Austin Peay State University	Clarksville	11,853
Hopkinsville Community College	Hopkinsville	4,446
Daymar College–Clarksville	Clarksville	1,255
Tennessee College of Applied Technology–Dickson	Dickson	1,086
Miller-Motte Technical College–Clarksville	Clarksville	935
North Central Institute	Clarksville	294
Brown Mackie College–Hopkinsville	Hopkinsville	208
Queen City College	Clarksville	165
Nashville State Community College–Clarksville	Clarksville	700
Bethel University–Clarksville	Clarksville	n/a
Troy University–Clarksville	Clarksville	n/a
Total		20,942

Source: National Center for Educational Statistics, ESRI, Garner Economics

**Figure 5.4
Montgomery County Labor Draw
Colleges and Universities**

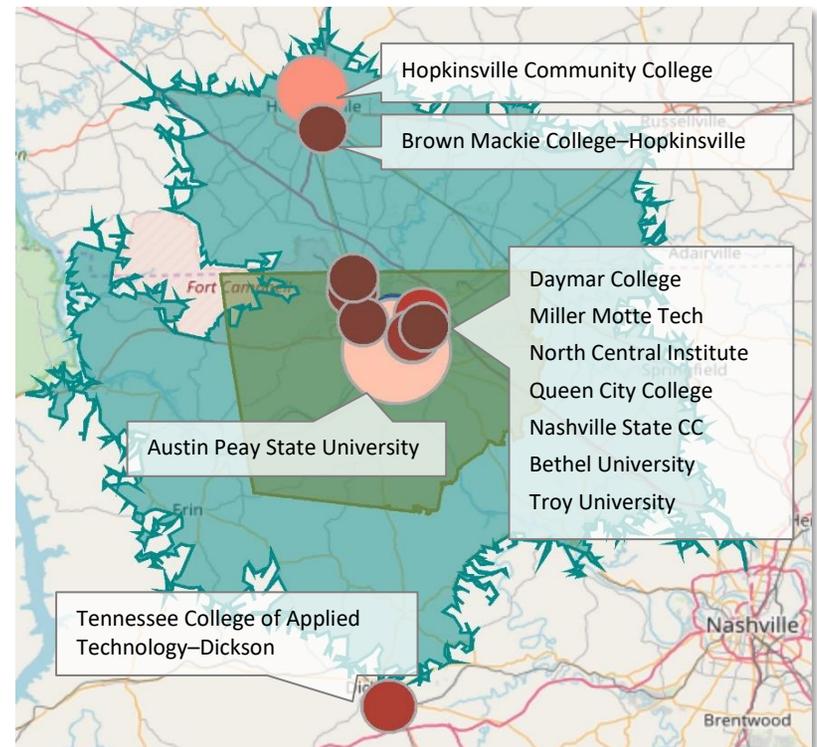




Table 5.4
Montgomery County Labor Draw
Degrees & Certificates Granted by Top Areas of Study, 2016

Degrees or Certificates Granted, 2016	
Health Professions and Related Programs	1,092
Liberal Arts and Sciences, General Studies, and Humanities	721
Business, Management, Marketing, and Related Support Services	375
Mechanic and Repair Technologies/Technicians	320
Parks, Recreation, Leisure and Fitness Studies	222
Homeland Security, Law Enforcement, Firefighting, and Related Protective Service	191
Education	189
Transportation and Materials Moving	185
Personal and Culinary Services	169
Computer and Information Sciences and Support Services	161
Communication, Journalism, and Related Programs	123
Engineering Technologies and Engineering-related Fields	107
Public Administration and Social Service Professions	100
Psychology	91
Agriculture, Agriculture Operations, and Related Sciences	91
Precision Production	76
Construction Trades	58
Physical Sciences	57
Visual and Performing Arts	57
Biological and Biomedical Sciences	54
Social Sciences	53
English Language and Literature/Letters	50
Grand Total	4,668

Table 5.5
Montgomery County Labor Draw
Degrees & Certificates Granted, 2016

Degrees or Certificates Granted, 2016	
Certificates	1,632
Associate Degree	1,136
Bachelor's Degree	1,586
Master's Degree	314
Total	4,668

The information above does not include degrees granted by Nashville State Community College–Clarksville, Bethel University–Clarksville, and Troy University–Clarksville.

Source: National Center for Educational Statistics, Garner Economics

Commuting Patterns

Worker flows help define the size of a local economy’s labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments (major construction projects, on-site consulting, etc.).

In 2015, Montgomery County had 46 percent of its working residents leaving the County for work (Figure 5.5). For jobs inside the County, 33 percent were filled by those commuting into Montgomery County for work, or in-commuters.

Montgomery County experienced a net job outflow of 11,447, meaning there are more workers leaving the County for employment

than coming into the County for jobs (Table 5.6). Over the past five years, the composition of the commuting pattern has changed with more workers living and working in the County, growing 19 percent; out-commuting has increased 18 percent, but in-commuting has only grown 2.5 percent. This pattern has resulted in a 47 percent larger net job outflow for Montgomery County.

Montgomery County has a strong commuting connection to neighboring Nashville-Davidson County. More than 7,000 workers leave the County for work in Davidson County, while only 1,600 workers from Davidson County travel to Montgomery for work (Figures 5.6 and 5.7).

Figure 5.5
Montgomery County Commuting Patterns, 2015



**The U.S. Census Bureau counts one primary job per worker.
Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics*

Table 5.6
Montgomery County Commuting Changes, 2010–2015

	2010	2015	2010–2015 % Change
Living in Montgomery County	47,919	56,850	18.6%
Employed in Montgomery County	40,142	45,403	13.1%
Living and Employed in Montgomery County	25,599	30,501	19.1%
Living in Montgomery County but Employed Outside—Out-Commuters	22,320	26,349	18.1%
Employed in Montgomery County but Living Outside—In-Commuters	14,543	14,902	2.5%
Net Job Inflow (+) or Outflow (-)	-7,777	-11,447	47.2%

Figure 5.6
Montgomery County In-Commuters, 2015

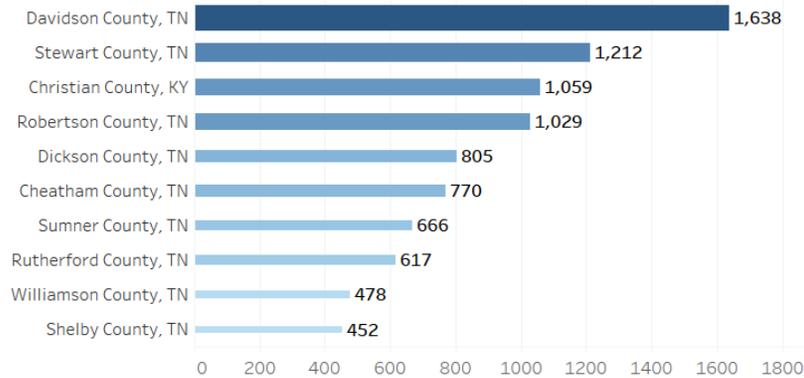
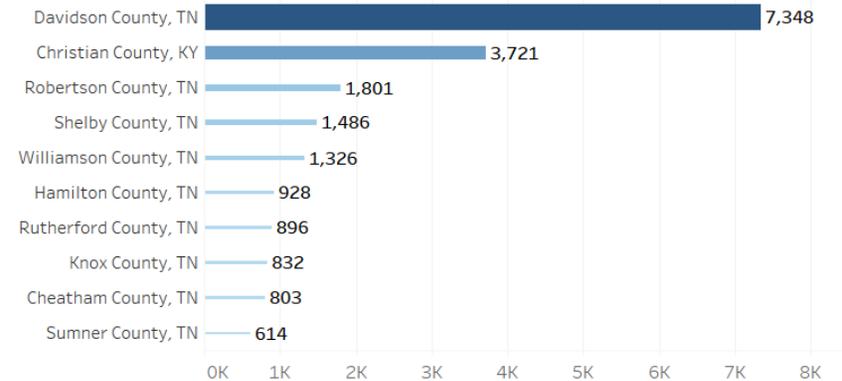


Figure 5.7
Montgomery County Out-Commuters, 2015



**The U.S. Census Bureau counts one primary job per worker.*

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics

Major Industry Sector Composition

A comparison of major industry employment composition provides a broad relative assessment of differences among economies. In 2017, Montgomery County's largest sector of employment was *Government*, with 20 percent of the total employment (Table 5.7). Total employment includes covered and uncovered employment and self-employment and, therefore, would include military personnel. The Clarksville MSA has the highest level of *Government* employment at 39 percent.

Montgomery County's next largest employment sectors are *Retail Trade* and *Accommodation & Food Services* with 15.5 percent and 13.4 percent respectively, greater than any other geography. A detailed analysis of Montgomery County's industrial and occupational specialization relative to the nation can be found in *Chapter 7: Local Specialization, Competitiveness & Growth* and in the appendices.

Table 5.7
Industry Sector Composition, 2016
Highest Relative Figure Shaded

Industry Sector	Montgomery County	Florence County	Madison County	Clarksville MSA	Tennessee	United States
Government	20.3%	19.9%	21.6%	39.0%	13.8%	15.4%
Retail Trade	15.5%	12.8%	10.3%	10.4%	10.8%	10.3%
Accommodation & Food Services	13.4%	10.3%	8.0%	8.5%	9.0%	8.6%
Health Care & Social Assistance	11.6%	14.0%	7.9%	8.8%	11.7%	12.6%
Manufacturing	7.7%	8.4%	10.0%	8.8%	10.8%	7.9%
Administrative & Support, Waste Management & Remediation	6.1%	5.5%	8.6%	5.0%	7.6%	6.2%
Construction	5.0%	3.5%	3.2%	3.3%	5.1%	5.5%
Other Services	4.9%	5.5%	4.0%	3.4%	5.0%	4.8%
Professional, Scientific & Technical Services	2.6%	4.0%	15.5%	2.1%	4.8%	6.4%
Finance & Insurance	2.4%	3.7%	1.8%	1.7%	3.5%	3.9%
Wholesale Trade	2.2%	3.6%	2.0%	1.8%	3.8%	3.8%
Real Estate, Rental & Leasing	1.9%	1.2%	1.1%	1.1%	1.6%	1.7%
Information	1.6%	1.2%	1.1%	1.0%	1.5%	1.9%
Transportation & Warehousing	1.4%	3.1%	1.3%	2.0%	5.2%	3.5%
Educational Services	1.2%	0.6%	1.5%	1.0%	2.1%	2.6%
Arts, Entertainment & Recreation	0.9%	0.8%	1.3%	0.6%	1.5%	1.7%
Management of Companies & Enterprises	0.5%	1.4%	0.3%	0.3%	1.4%	1.4%
Mining, Quarrying, Oil & Gas Extraction	0.5%	0.0%	0.0%	0.3%	0.1%	0.4%
Utilities	0.3%	0.1%	0.0%	0.2%	0.1%	0.4%
Agriculture, Forestry, Fishing & Hunting	0.2%	0.4%	0.3%	1.0%	0.6%	1.2%

Source: EMSI, Garner Economics

Estimated Annual Wages

In 2017, the estimated average wage per job in Montgomery County equaled \$35,592 annually or \$684 weekly (Figure 5.8). It should be noted that wage applies only to **employment in Montgomery County** and does not measure wages for those workers who live in Montgomery County but commute outside the area. (See *Commuting* earlier in Chapter 5.) The annual average earnings for all County residents, whether they stay in the County for work or out-commute, is \$45,894 for 2016. (See *Individual Earnings* in Chapter 4.)

Montgomery County had the lowest average annual wage among the benchmark geographies and also had a modest growth rate of 4.5 percent from 2012 to 2017 (Table 5.8). This growth rate was the same as the Clarksville MSA. Both geographies grew the least among all areas in this comparison. Adjusted for inflation, Montgomery County’s average annual wages remained rather flat with little growth (Figure 5.9).

Figure 5.8
Estimated Annual Wages, 2017

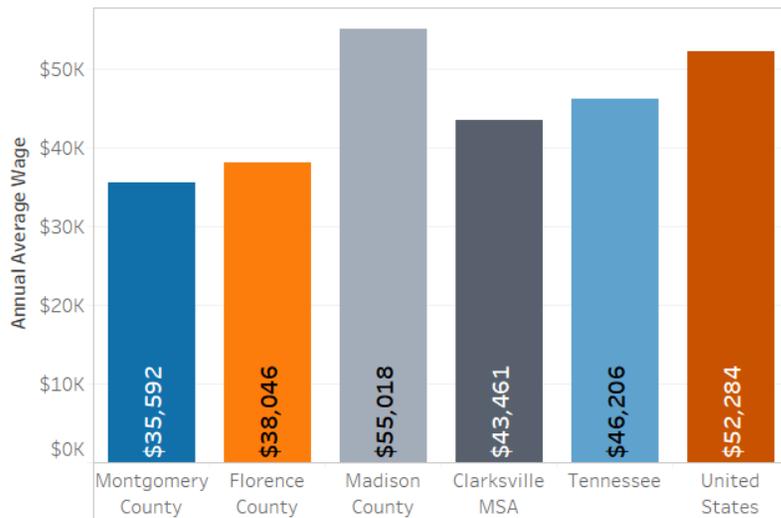


Figure 5.9
Montgomery County Annual Wages (Adjusted for Inflation)

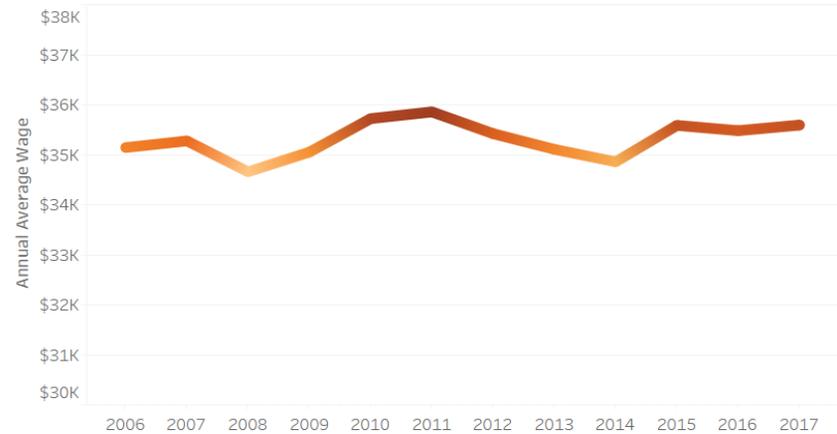


Table 5.8
Wage Change, 2006–2016

	Wage Change	Percent Change
Montgomery County	\$1,878	4.5%
Florence County	\$3,409	9.8%
Madison County	\$3,665	7.1%
Clarksville MSA	\$1,878	4.5%
Tennessee	\$4,424	10.6%
United States	\$5,379	11.5%

Source: EMSI, Garner Economics

Unionization

Utilizing observations from the Bureau of Labor Statistics' *Current Population Survey*, an estimate of the rate of private and public worker unionization at the metropolitan level can be constructed.

The rate of private worker unionization observed for the Clarksville MSA in 2017 was 4.8 percent, below the national rate but higher than

the state and benchmarks (Table 5.9). Public unionization membership is very high in Huntsville and the statewide rate, while the Clarksville MSA 8 percent rate is significantly lower, along with the Florence MSA (7.9 percent). The total unionization rate for Clarksville is 5.8 percent, higher than the state and benchmarks; however, below the national rate of 10.7 percent (Figure 5.10).

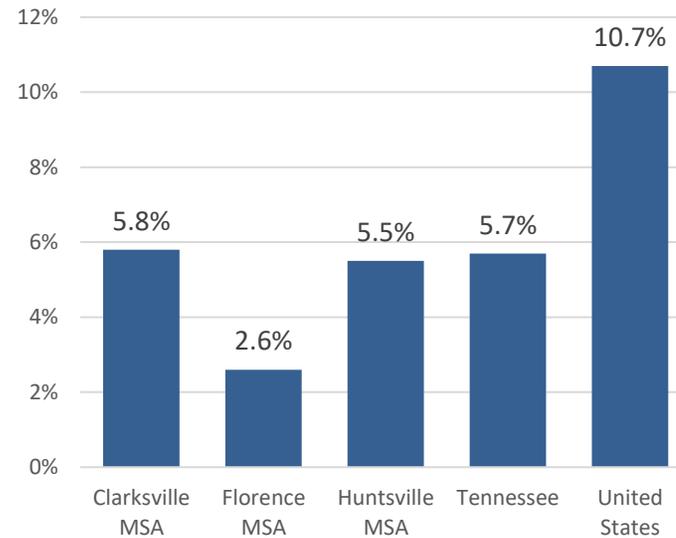
Table 5.9
Unionization Rate, 2017

	Private	Public	Total
Clarksville MSA	4.8%	8.0%	5.8%
Florence MSA	1.5%	7.9%	2.6%
Huntsville MSA	1.8%	20.3%	5.5%
Tennessee	3.5%	19.4%	5.7%
United States	6.5%	34.4%	10.7%

Data were only reported at the MSA level.

Source: © 2018 by Barry T. Hirsch and David A. Macpherson, Garner Economics

Figure 5.10
Total Unionization Rate, 2017



Data were only reported at the MSA level.

Source: © 2018 by Barry T. Hirsch and David A. Macpherson, Garner Economics

New Firms Startups

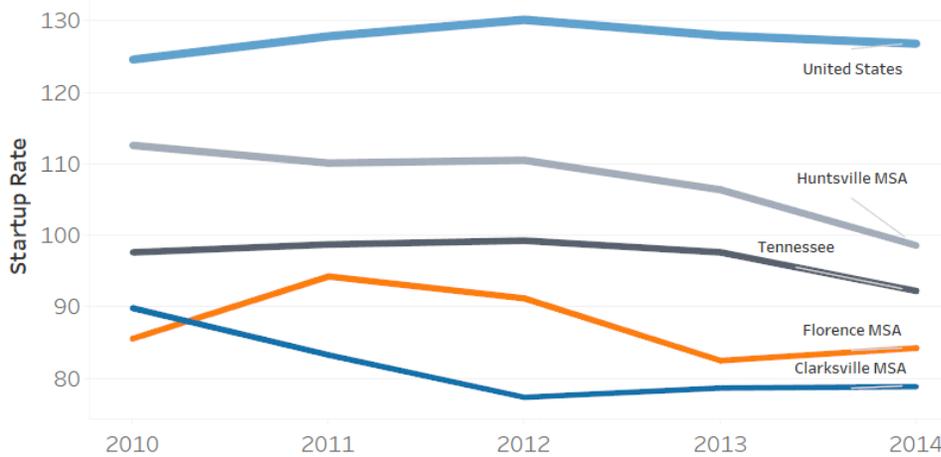
Tracking the rate of startup firms is another good measure of the entrepreneurial ecosystem of an area. The ability to create a new company establishes new jobs and helps bolster the local economy. Additionally, new firms contribute disproportionately to job creation and have an important role in employment growth.

Startup activity is viewed by both startup rate and employment by new firms. Measuring startups relative to population—number of new firms per 100,000 people—helps to compare relative activity across different areas. The Clarksville MSA startup activity, available at the metro level,

has remained fairly flat since 2012 and has seen the lowest rate among benchmarks since 2011 (Figure 5.11).

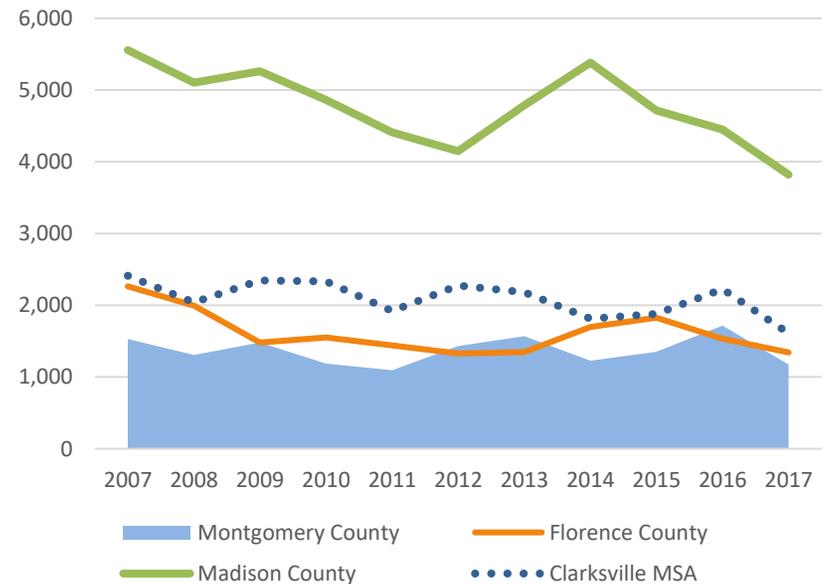
Another indicator to consider is the employment created by new firms. At the local and metro levels, the number of people employed at firms that were newly established (0–1 year-old) illustrate how startups add to the economy. Montgomery County had the lowest employment in 2017 and remained below all other benchmark locations with few exceptions (Figure 5.12).

Figure 5.11
Number of Startups per 100,000 population



Source: U.S. Census Bureau, Business Dynamics Statistics, Garner Economics

Figure 5.12
Employment at New Firms



Source: U.S. Census Bureau, LEHD, Garner Economics

Self-Employment

Measuring the proportion of people who are *Self-Employed* is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

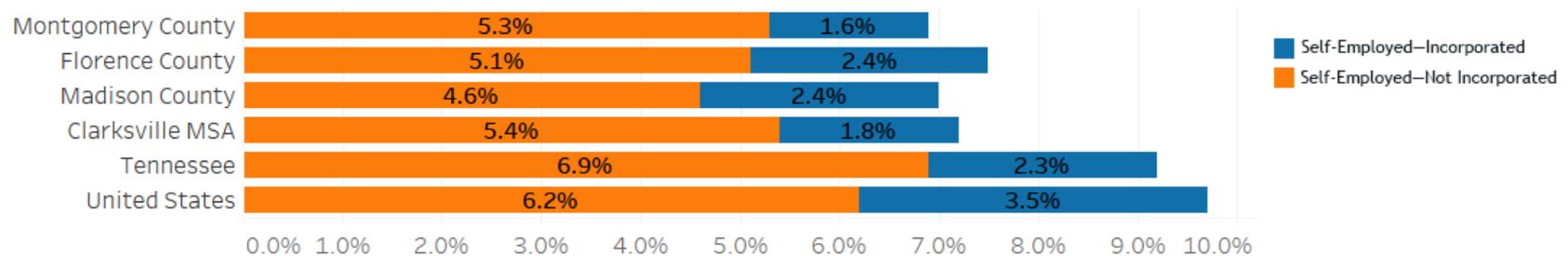
As of 2016, 8.7 percent of workers in Montgomery County were *Self-Employed*. The proportion is below the national state self-employment level for the nation, the state, and the benchmark communities (Table 5.10).

Of those *Self-Employed*, a much higher share are in the category of *Not Incorporated and Unpaid Family Workers* for all geographies versus *Incorporated* ventures (Figure 5.13). All benchmark geographies declined in levels of self-employment over the past five years, with the Clarksville MSA losing 2.1 percent of those who were *Self-Employed* from 2011 to 2016.

Table 5.10
Self-Employed as a Percentage of Workers 16 Years+
(Highest Relative Number Shaded)

Geography	Self-Employed–2011			Self-Employed–2016			Change in Total Self-Employment 2011–2016
	Incorporated	Not Incorporated & Unpaid Family Workers	Total Self-Employed	Incorporated	Not Incorporated & Unpaid Family Workers	Total Self-Employed	
Montgomery County	1.9%	6.8%	8.7%	1.6%	5.3%	6.9%	-1.8%
Florence County	3.1%	6.3%	9.4%	2.4%	5.1%	7.5%	-1.9%
Madison County	2.9%	5.2%	8.1%	2.4%	4.6%	7.0%	-1.1%
Clarksville MSA	2.1%	7.2%	9.3%	1.8%	5.4%	7.2%	-2.1%
Tennessee	2.5%	7.6%	10.1%	2.3%	6.9%	9.2%	-0.9%
United States	3.6%	6.6%	10.2%	3.5%	6.2%	9.7%	-0.5%

Figure 5.13
Self-Employed as a Percentage of Workers 16 Years+, 2016



Source: U.S. Census Bureau American Community Survey (5-Year Averages compared); Garner Economics

Broadband Availability

Broadband access and speed have a big impact on the local economy in terms of supporting business, entrepreneurship, and educational opportunities.

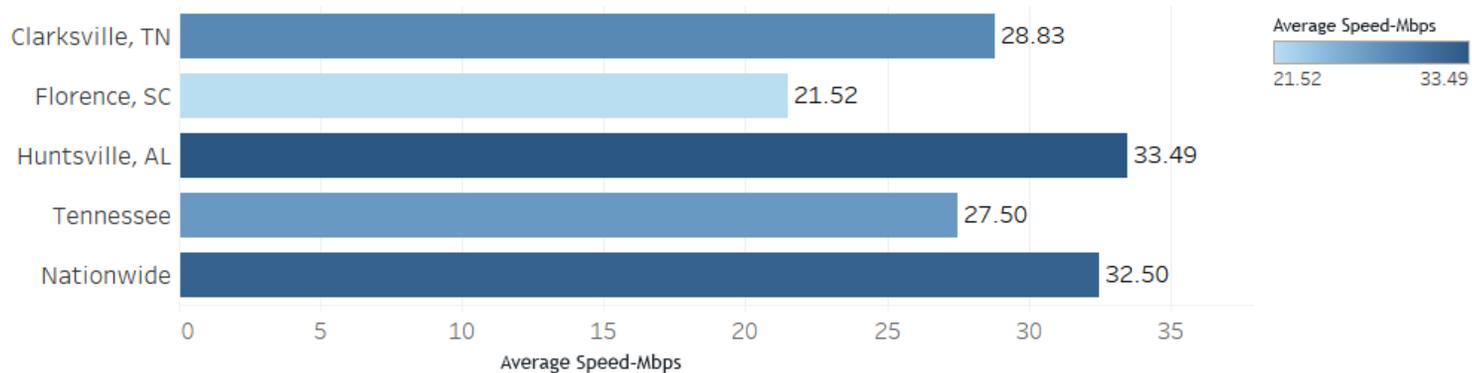
According to BroadbandNow, a national aggregator of internet access and speeds, Montgomery County has good access to broadband internet with speeds up to 1,000 megabits per second, or Mbps. More than 96.5 percent of households have access to broadband internet that is at least 25 Mbps, which is the highest level of access for the state and other benchmarks. (Table 5.11). More impressive is the fact that 66.5 percent of Clarksville have the opportunity to get gigabit service. Two providers advertise the availability of Gig service including the city-owned municipal service.

According to BroadbandNow, the city of Clarksville has an average download speed of 28.83 Mbps (Figure 5.14). This does not vary greatly from those in Huntsville and the state of Tennessee; however, it is slightly below the national average of 32.5 Mbps.

Table 5.11
2017 Broadband Access & Speed Available
Percent of Population
Highest Relative Figure Shaded

Broadband Access	Clarksville, TN	Florence, SC	Huntsville, AL	Tennessee
25 Mbps or faster	96.5%	94.0%	92.9%	90.1%
100 Mbps or faster	96.5%	5.2%	80.0%	87.1%
1 gigabit	66.5%	5.2%	0.0%	18.8%

Figure 5.14
Average Download Speed



Source: BroadbandNow, 2017

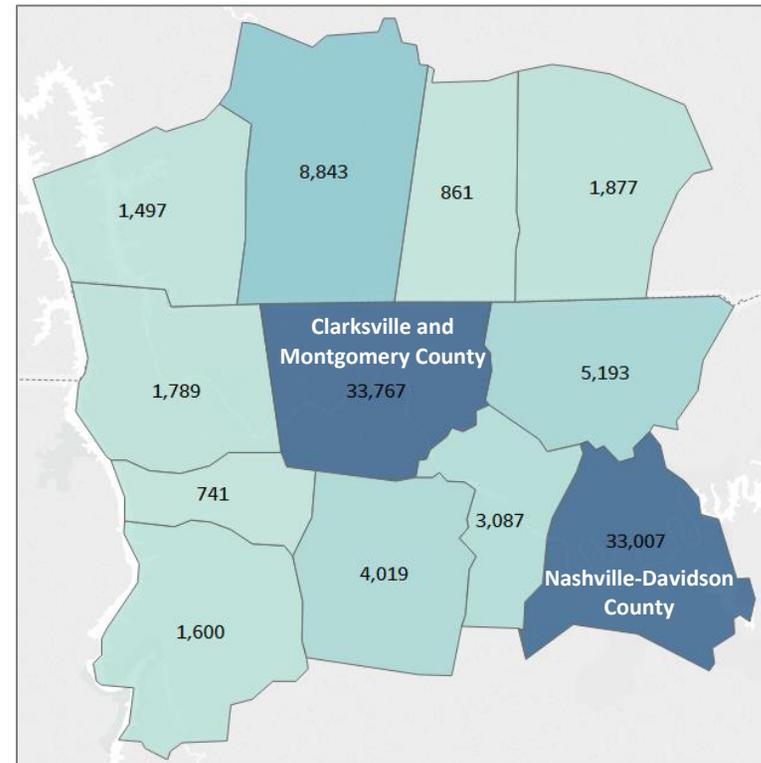
Military & Talent Opportunity

The United States Armed Forces has had a long history and sizable impact on the local economy of the Clarksville and Montgomery County area. Fort Campbell supports a large military population and the area is home to approximately 96,000 veterans, with 33,767 of those in Montgomery County alone (Table 5.12). The area around Clarksville is comprised of 12 counties which align with the 45-minute drive-time analysis performed for this study (Figure 5.15).

The profile of the veteran population in Montgomery County shows a high percentage of relatively young (17–44) veterans at 45 percent compared to those ages 45 and older (Figure 5.16). This is significantly higher than the age distribution for the surrounding area. All age groups are projected to grow, keeping this concentration of younger veterans living in the area (Figure 5.17).

Separate from the economic impact of the military is the talent opportunity for Montgomery County. The County has long been the benefactor of military veterans and families joining the civilian workforce. Recent studies indicate that, based on data collection in late 2016, an average of 400 individuals were separating from service on a monthly basis.² Mapping military skills to civilian occupations demonstrates the technical, administrative, and logistic skills. Tennessee Connects and schools that offer Part 65 A&P Certification completion to experienced airframe mechanics (such as military personnel) are examples of how programs can connect and further the education of veterans.

Figure 5.15 Veteran Population (Current & Projected)



The counties of Cheatham, TN; Christian, KY; Davidson, TN; Dickson, TN; Houston, TN; Humphreys, TN; Logan, KY; Montgomery, TN; Robertson, TN; Stewart, TN; Todd, KY; and Trigg, KY are included in calculating the veteran population in the surrounding area. This aligns with a 45-minute drive-time.

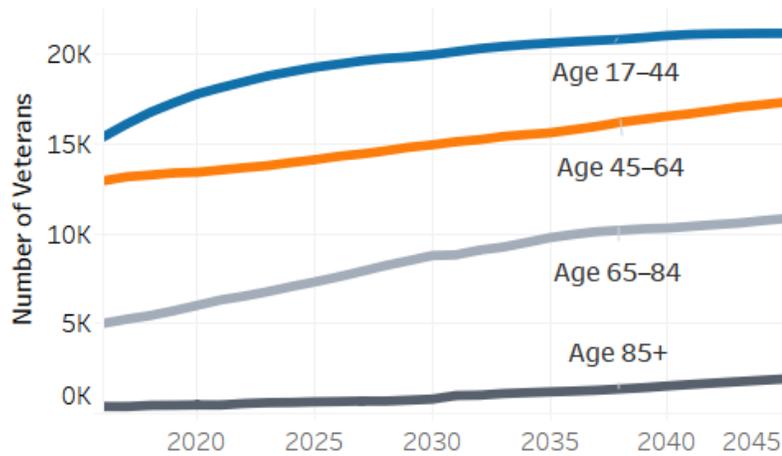
Source: National Center for Veterans Analysis and Statistics, Garner Economics

² TIP Strategies, Fort Campbell Strong Economic Growth Plan, December 2016

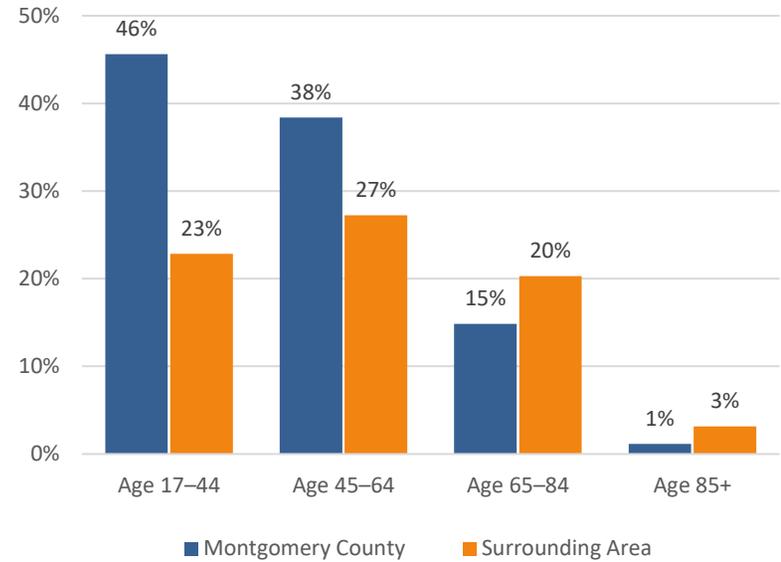
Table 5.12 Veteran Population and Projections

	2016	2026	Projected Change 2016–2026
Montgomery County	33,767	42,047	24.52%
Clarksville MSA	44,108	54,499	23.56%
Surrounding Area	96,281	97,417	1.18%
United States	20,392,192	16,698,750	-18.11%

**Figure 5.17 Veteran Population and Projections by Age Groups
Montgomery County, 2016–2026**



**Figure 5.16 Veteran Population by Age Groups, 2016
Montgomery County and Surrounding Area**



Source: National Center for Veterans Analysis and Statistics, Garner Economics

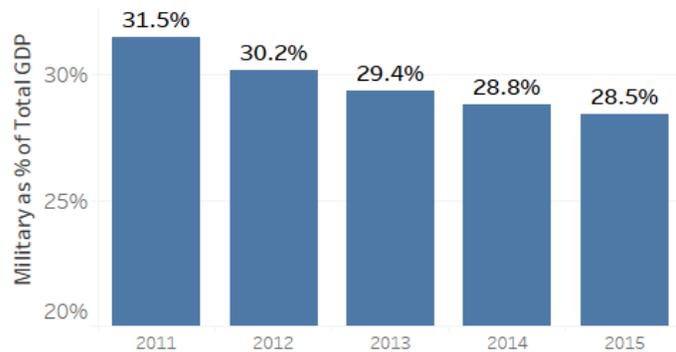
Gross Domestic Product & Military Purchases

In 2015, federal military expenditures and investment equaled \$2.7 billion inflation-adjusted dollars, 28.5 percent of the Clarksville MSA's total regional GDP (Table 5.13). The contribution of the federal military to total GDP declined by 3 percent from 2011 to 2015, as illustrated in Figure 5.14. Top industry purchases by the military show industrial suppliers and technical services while those purchases with the most in-region percentage were more varied and included food, entertainment, real estate, and construction-related industries (Tables 5.14 and 5.15).

Table 5.13
GDP and Federal Military GDP

Industry	2011	2012	2013	2014	2015
All Industries	\$10,190	\$10,047	\$9,791	\$9,620	\$9,634
Private industries	\$5,682	\$5,671	\$5,555	\$5,493	\$5,534
Military	\$3,210	\$3,030	\$2,875	\$2,773	\$2,741
Military as % of Total GDP	31.5%	30.2%	29.4%	28.8%	28.5%

Figure 5.18
GDP and Federal Military GDP



Inflation-adjusted, chained 2009 dollars

Source: Bureau of Economic Analysis, Garner Economics

Table 5.14

Top Ten Industry Purchases by Federal Military in Montgomery County

Purchases From	% In-Region	% Imported	Total Purchases
Transportation Equipment Mfg.	4.5%	95.5%	\$15,499,252
Professional, Scientific & Technical Svcs.	19.7%	80.3%	\$10,257,822
Computer and Electronic Product Mfg.	0.3%	99.7%	\$2,557,988
Administrative and Support Services	41.0%	59.0%	\$1,954,519
Petroleum and Coal Products Mfg.	0.1%	99.9%	\$1,825,588
Merchant Wholesalers, Durable Goods	18.8%	81.2%	\$1,416,033
Fabricated Metal Product Mfg.	3.3%	96.7%	\$1,316,307
Air Transportation	0.2%	99.8%	\$1,191,276
Telecommunications	28.2%	71.8%	\$1,065,940
Water Transportation	9.0%	91.0%	\$1,009,685

Table 5.15

Industry Purchases Ranked by Top In-Region Purchases by Federal Military in Montgomery County

Purchases from	% In-Region	% Imported	Total Purchases
Food Services & Drinking Places	98.6%	1.4%	\$176,121
Real Estate	87.7%	12.3%	\$867,102
Performing Arts, Spectator Sports & Related	84.4%	15.6%	\$181,060
Specialty Trade Contractors	68.0%	32.0%	\$932,616
Credit Intermediation & Related	67.1%	32.9%	\$110,231
Repair & Maintenance	66.3%	33.7%	\$219,912
Truck Transportation	60.0%	40.0%	\$978,522
Heavy & Civil Engineering Construction	55.0%	45.0%	\$215,905
Rail Transportation	52.6%	47.4%	\$194,513
Construction of Buildings	51.0%	49.0%	\$366,017

Source: EMSI, Garner Economics

Hospitality

Travel and Tourism is one of the world’s fastest growing and largest sectors. With technology shaping the future of the industry, travel is all about the experience.³ There is an ongoing need for workers, who are an essential part of visitors having a positive experience in the area restaurants, hotels, and related locations. Montgomery County has occupational strengths in this industry with many roles having a higher-than-average concentration or Location Quotient (LQ). Positions in supervisory roles, cooks, food service, and entertainment attendants show a high LQ (Table 5.16). The only job losses over the past five years may be due to automation—entertainment ticket takers and dishwashers experienced minimal employment disruption.

Table 5.16
Hospitality Related Occupations in Montgomery County
Location Quotients Greater than 1.2 Highlighted

SOC	Description	2017 Jobs	2017 LQ	Avg. Hourly Earnings	2012–2017 Employment Change
35-1000	Supervisors of Food Preparation & Serving Workers	572	1.42	\$13.73	72
35-1011	Chefs & Head Cooks	74	1.29	\$17.52	8
35-1012	Supervisors of Food Preparation & Serving Workers	499	1.44	\$13.17	64
35-2000	Cooks & Food Preparation Workers	2,095	1.71	\$9.66	222
35-2011	Cooks, Fast Food	919	4.79	\$8.80	106
35-2012	Cooks, Institution & Cafeteria	147	0.92	\$10.76	1
35-2014	Cooks, Restaurant	462	0.99	\$11.40	52
35-2015	Cooks, Short Order	121	1.75	\$9.05	9
35-2021	Food Preparation Workers	439	1.35	\$9.48	53
35-3000	Food & Beverage Serving Workers	3,692	1.34	\$9.18	424
35-3011	Bartenders	194	0.85	\$10.74	20
35-3021	Combined Food Preparation & Serving Workers, Including Fast Food	1,717	1.33	\$8.85	250
35-3022	Counter Attendants, Cafeteria, Food Concession & Coffee Shop	333	1.75	\$9.72	41
35-3031	Waiters & Waitresses	1,326	1.38	\$9.18	108
35-3041	Food Servers, Nonrestaurant	122	1.24	\$10.03	5
35-9000	Other Food Preparation & Serving Related Workers	457	0.87	\$9.10	27
35-9011	Dining Room & Cafeteria Attendants & Bartender Helpers	107	0.67	\$9.53	5
35-9021	Dishwashers	91	0.48	\$9.07	(4)

³ Deloitte, 2018 Travel and Hospitality Industry Outlook, Accessed April 2018

SOC	Description	2017 Jobs	2017 LQ	Avg. Hourly Earnings	2012-2017 Employment Change
35-9031	Hosts & Hostesses, Restaurant, Lounge & Coffee Shop	222	1.47	\$8.49	21
35-9099	Food Preparation & Serving Related Workers, All Other	36	1.53	\$11.72	5
37-1000	Supervisors of Building & Grounds Cleaning & Maintenance Workers	133	1.02	\$14.20	16
37-1011	Supervisors of Housekeeping & Janitorial Workers	84	1.10	\$14.24	8
37-1012	Supervisors of Landscaping, Lawn Service & Groundskeeping Workers	49	0.91	\$14.15	8
37-2000	Building Cleaning & Pest Control Workers	1,540	1.00	\$11.31	120
37-2011	Janitors & Cleaners, Except Maids & Housekeeping Cleaners	888	0.93	\$11.81	79
37-2012	Maids & Housekeeping Cleaners	578	1.04	\$9.74	41
37-3000	Grounds Maintenance Workers	429	0.82	\$10.93	62
37-3011	Landscaping & Groundskeeping Workers	368	0.77	\$10.85	46
39-3000	Entertainment Attendants & Related Workers	95	0.42	\$9.28	(8)
39-3031	Ushers, Lobby Attendants & Ticket Takers	31	0.67	\$8.03	(12)
39-3091	Amusement & Recreation Attendants	37	0.32	\$8.83	2
39-3099	Entertainment Attendants & Related Workers, All Other	18	3.11	\$9.58	3
39-5000	Personal Appearance Workers	516	1.39	\$11.96	96
39-5012	Hairdressers, Hairstylists & Cosmetologists	389	1.49	\$12.33	46
39-6000	Baggage Porters, Bellhops & Concierges	12	0.41	\$9.75	1
39-7000	Tour & Travel Guides	15	0.74	\$11.73	2
39-9000	Other Personal Care & Service Workers	1,393	0.90	\$9.63	119
39-9032	Recreation Workers	106	0.77	\$10.73	6
41-1000	Supervisors of Sales Workers	1,115	1.70	\$19.53	155
41-1011	Supervisors of Retail Sales Workers	1,014	1.94	\$18.91	142
41-1012	Supervisors of Non-Retail Sales Workers	101	0.75	\$25.82	13
41-2000	Retail Sales Workers	5,165	1.57	\$11.65	664
41-2011	Cashiers	2,073	1.57	\$9.47	257
41-2021	Counter & Rental Clerks	186	1.11	\$14.89	33
41-2031	Retail Salespersons	2,696	1.58	\$12.90	355
43-4000	Information and Record Clerks	3,162	1.45	\$13.53	1,134
43-4081	Hotel, Motel, & Resort Desk Clerks	117	1.25	\$9.50	8
43-4171	Receptionists & Information Clerks	398	1.01	\$12.17	41

Source: EMSI, Garner Economics

CHAPTER 6: RETAIL ANALYSIS

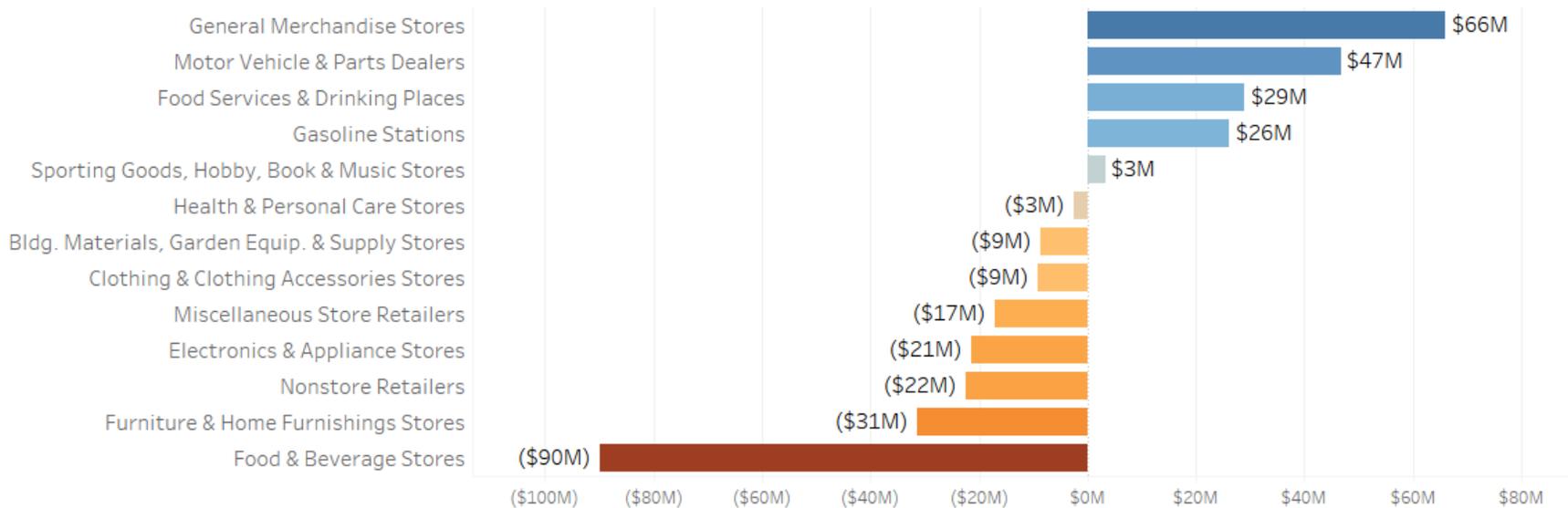
To determine specific industries with retail potential, a retail leakage or gap analysis, was conducted. Leakage in an area represents a condition where demand exceeds supply. In other words, retailers outside the market area are fulfilling the demand for retail products, and demand is therefore "leaking" out of the trade area. If leakage is high, the county could potentially support more businesses in that area.

Montgomery County's 2017 retail sales were estimated to be \$2.3 billion for retail trades, food, and drink sales. The County has a retail gap of \$31.5 million dollars. This is the difference between retail demand, or the "retail potential," and actual retail sales. This means that Montgomery County performs rather well in fulfilling market demand.

A review of 13 major retail categories reveals that several categories out-sell local demand and the County is attracting retail buyers in these categories. Major areas that sell more than estimated demand include General Merchandise Stores; Motor Vehicle & Parts Dealers; Food Services & Drinking Places; Gasoline Stations; and Sporting Goods, Hobby, Book and Music Stores (Figure 6.1, Table 6.1).

Surprisingly, Food & Beverage Stores had a large retail gap of nearly \$90 million for the County retail market. In particular, Grocery Stores under that category was the area of concern. Categories with a high leakage factor tend to have fewer retailers in the market, but household demand exists. Nonstore Retail is often the category with leakage, which accounts for digital commerce as internet-based retail continues to thrive.

Figure 6.1
Montgomery County Retail Surplus/Leakage, 2017



Source: ESRI Retail MarketPlace Profile, Garner Economics

Table 6.1
Retail Sales and Leakage in Montgomery County, 2016

Industry Group	NAICS	Retail Potential (Demand)	Retail Sales (Supply)	Retail Gap
Motor Vehicle & Parts Dealers	441	\$463,834,261	\$510,609,571	\$46,775,310
Automobile Dealers	4411	\$362,804,054	\$469,299,987	\$106,495,933
Other Motor Vehicle Dealers	4412	\$57,462,050	\$21,490,705	-\$35,971,345
Auto Parts, Accessories & Tire Stores	4413	\$43,568,157	\$19,818,879	-\$23,749,278
Furniture & Home Furnishings Stores	442	\$78,916,302	\$47,643,514	-\$31,272,788
Furniture Stores	4421	\$43,410,906	\$36,950,477	-\$6,460,429
Home Furnishings Stores	4422	\$35,505,396	\$10,693,037	-\$24,812,359
Electronics & Appliance Stores	443	\$67,045,760	\$45,568,686	-\$21,477,074
Bldg. Materials, Garden Equip. & Supply Stores	444	\$138,788,858	\$130,151,277	-\$8,637,581
Bldg. Material & Supplies Dealers	4441	\$128,532,557	\$122,793,158	-\$5,739,399
Lawn & Garden Equip & Supply Stores	4442	\$10,256,301	\$7,358,119	-\$2,898,182
Food & Beverage Stores	445	\$374,883,093	\$284,928,868	-\$89,954,225
Grocery Stores	4451	\$328,091,185	\$246,667,550	-\$81,423,635
Specialty Food Stores	4452	\$18,552,172	\$4,789,697	-\$13,762,475
Beer, Wine & Liquor Stores	4453	\$28,239,736	\$33,471,621	\$5,231,885
Health & Personal Care Stores	446,4461	\$114,061,228	\$111,425,548	-\$2,635,680
Gasoline Stations	447,4471	\$234,326,374	\$260,510,799	\$26,184,425
Clothing & Clothing Accessories Stores	448	\$98,000,732	\$88,724,324	-\$9,276,408
Clothing Stores	4481	\$62,260,008	\$59,075,648	-\$3,184,360
Shoe Stores	4482	\$19,238,801	\$13,581,024	-\$5,657,777
Jewelry, Luggage & Leather Goods Stores	4483	\$16,501,923	\$16,067,652	-\$434,271
Sporting Goods, Hobby, Book & Music Stores	451	\$58,333,082	\$61,597,016	\$3,263,934
Sporting Goods/Hobby/Musical Instrument Stores	4511	\$49,386,624	\$57,100,295	\$7,713,671
Book, Periodical & Music Stores	4512	\$8,946,458	\$4,496,721	-\$4,449,737

Industry Group	NAICS	Retail Potential (Demand)	Retail Sales (Supply)	Retail Gap
General Merchandise Stores	452	\$364,054,591	\$430,089,508	\$66,034,917
Department Stores Excluding Leased Depts.	4521	\$265,641,105	\$310,583,419	\$44,942,314
Other General Merchandise Stores	4529	\$98,413,486	\$119,506,089	\$21,092,603
Miscellaneous Store Retailers	453	\$83,748,618	\$66,672,814	-\$17,075,804
Florists	4531	\$2,948,819	\$1,623,372	-\$1,325,447
Office Supplies, Stationery & Gift Stores	4532	\$15,728,425	\$7,010,833	-\$8,717,592
Used Merchandise Stores	4533	\$10,403,721	\$14,214,912	\$3,811,191
Other Miscellaneous Store Retailers	4539	\$54,667,653	\$43,823,697	-\$10,843,956
Nonstore Retailers	454	\$37,826,644	\$15,404,021	-\$22,422,623
Electronic Shopping & Mail-Order Houses	4541	\$28,867,733	\$11,545,086	-\$17,322,647
Vending Machine Operators	4542	\$3,517,556	\$1,346,880	-\$2,170,676
Direct Selling Establishments	4543	\$5,441,355	\$2,512,055	-\$2,929,300
Food Services & Drinking Places	722	\$229,382,752	\$258,371,175	\$28,988,423
Special Food Services	7223	\$3,104,377	\$1,254,008	-\$1,850,369
Drinking Places—Alcoholic Beverages	7224	\$4,340,796	\$4,236,650	-\$104,146
Restaurants/Other Eating Places	7225	\$221,937,579	\$252,880,517	\$30,942,938

Source: ESRI Retail MarketPlace Profile, Garner Economics

Note: Industries belonging to NAICS 722 (*Food Services and Drinking Places*) have been included as a convenience. Technically, these are not retail industries. Retail leakage is the value of retail goods that shoppers from your region buy from other regions. The "Demand" column represents the total amount that your residents spend on a particular industry, while the "Leakage" column represents how much of that spending happens outside of the region.

CHAPTER 7: LOCAL SPECIALIZATION, COMPETITIVENESS & GROWTH



The following section provides a more detailed and in-depth assessment of the Montgomery County economy. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The assessment's main goals are to provide historic context, reveal areas of unique specialization, gauge competitiveness, and help uncover emerging trends and opportunities. The two main areas of analysis are major industries and occupational groups. For each area, there are relative measures of specialization, growth, local competitiveness, and earnings.

Major Industry Sector Change

Between 2012 and 2017, the largest absolute industry job gains in Montgomery County came from *Administrative & Support, Waste Management & Remediation Services*, which increased by 1,300 jobs,

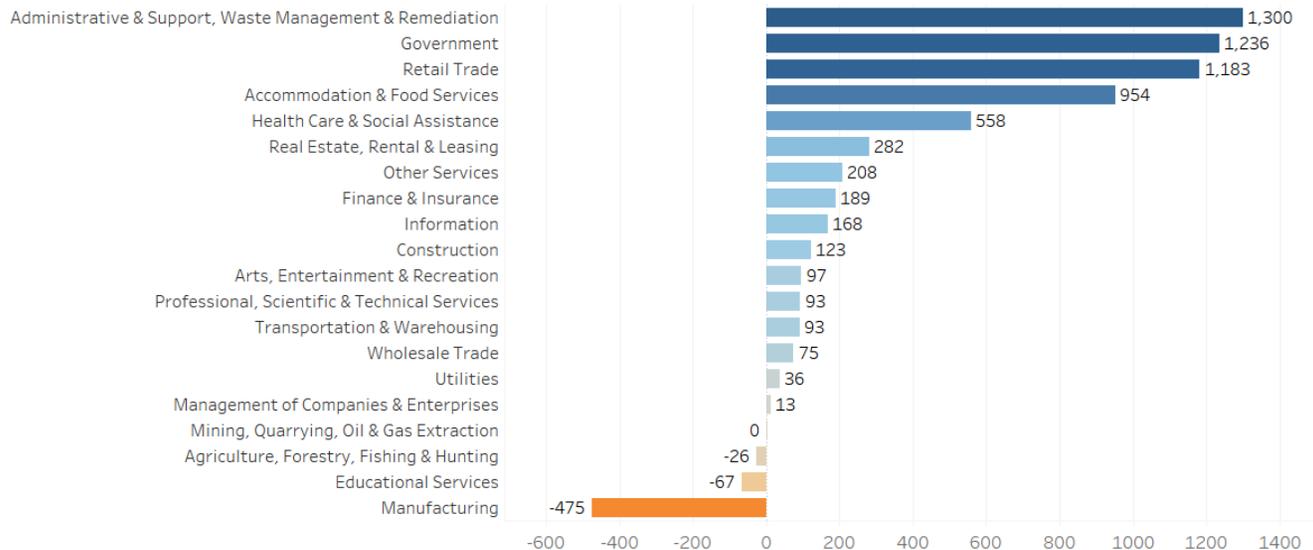
followed closely by *Government, Retail Trade, and Accommodation & Food Services* (Table 7.1). Overall, Montgomery County shows a net increase of 6,040 jobs taking into consideration covered, non-covered, and self-employed individuals.

Gains were made in most industry categories with the exception of *Manufacturing*, which lost 475 jobs, *Educational Services* (-67 jobs); and *Agricultural, Forestry, Fishing & Hunting* (-26).

A number of manufacturing expansions and locations have announced job growth recently, however some of these employment numbers will not be reflected in the report yet. The numbers below reflect a snapshot of change in reported employment between 2012 and 2017. Job gains and losses are based on multiple factors such as automation and individual company competitiveness.

Figure 7.1

2012–2017 Employment Change by Major Industry



Source: ESMI, Garner Economics

Table 7.1
Employment Change by Major Industry, 2012–2017
Ranked by Absolute Change

Description	2012 Jobs	2017 Jobs	Job Change 2012–2017	% Change 2012–2017
Administrative & Support, Waste Management & Remediation	2,319	3,620	1,300	56.1%
Government	10,784	12,020	1,236	11.5%
Retail Trade	7,964	9,147	1,183	14.9%
Accommodation & Food Services	6,969	7,923	954	13.7%
Health Care & Social Assistance	6,315	6,874	558	8.8%
Real Estate, Rental & Leasing	864	1,146	282	32.6%
Other Services	2,687	2,895	208	7.8%
Finance & Insurance	1,216	1,405	189	15.5%
Information	757	926	168	22.2%
Construction	2,808	2,931	123	4.4%
Arts, Entertainment & Recreation	413	509	97	23.4%
Professional, Scientific & Technical Services	1,427	1,520	93	6.5%
Transportation & Warehousing	729	822	93	12.7%
Wholesale Trade	1,199	1,274	75	6.3%
Utilities	123	159	36	29.2%
Management of Companies & Enterprises	283	297	13	4.7%
Mining, Quarrying, Oil & Gas Extraction	288	288	0	-0.1%
Agriculture, Forestry, Fishing & Hunting	152	126	-26	-17.1%
Educational Services	781	714	-67	-8.6%
Manufacturing	5,014	4,539	-475	-9.5%
Total	53,094	59,133	6,040	11%

Source: ESMI, Garner Economics

Industry Earnings

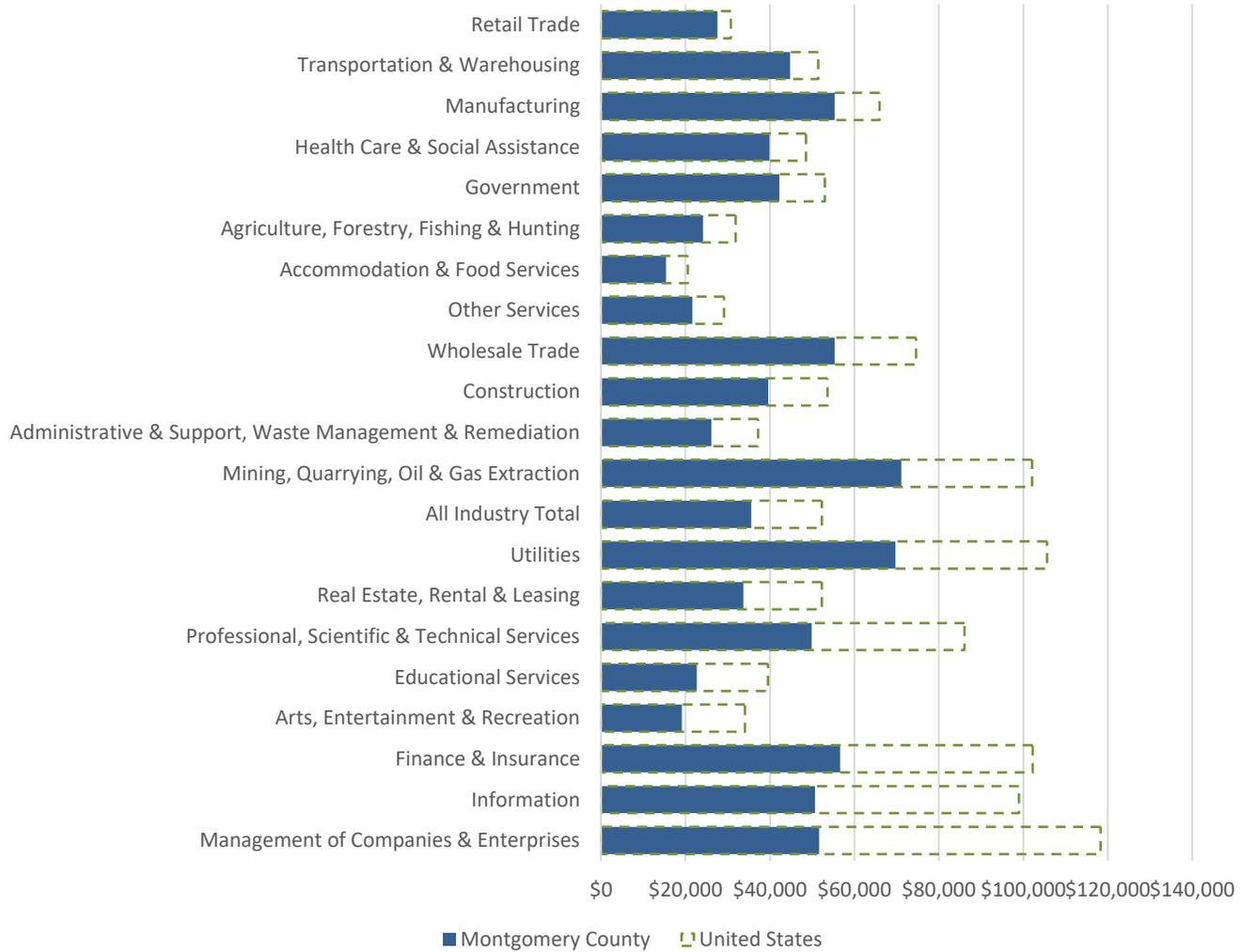
A comparison of Montgomery County’s average industry earnings to national averages offers insights into areas of unique expertise and cost-saving opportunities. Overall, the average earnings per job in Montgomery County of \$35,592 is 32 percent below the national average of \$52,284. Earnings in the County are below national averages for all major employment sectors (Figure 7.2, Table 7.2). Only *Management of Companies and Enterprises* was significantly lower than the national average—by 56 percent.

Table 7.2
Average Annual Industry Salary Comparison, 2017

Description	Montgomery County	United States	Percent Difference
Mining, Quarrying, Oil & Gas Extraction	\$71,096	\$102,114	-30%
Utilities	\$69,707	\$105,626	-34%
Finance & Insurance	\$56,595	\$102,241	-45%
Wholesale Trade	\$55,353	\$74,625	-26%
Manufacturing	\$55,317	\$65,962	-16%
Management of Companies & Enterprises	\$51,685	\$118,309	-56%
Information	\$50,681	\$98,989	-49%
Professional, Scientific & Technical Services	\$49,880	\$86,092	-42%
Transportation & Warehousing	\$44,804	\$51,466	-13%
Government	\$42,257	\$52,971	-20%
Health Care & Social Assistance	\$39,910	\$48,555	-18%
Construction	\$39,624	\$53,602	-26%
Real Estate, Rental & Leasing	\$33,734	\$52,306	-36%
Retail Trade	\$27,530	\$30,781	-11%
Administrative & Support, Waste Management & Remediation	\$26,129	\$37,170	-30%
Agriculture, Forestry, Fishing & Hunting	\$24,131	\$31,881	-24%
Educational Services	\$22,675	\$39,553	-43%
Other Services	\$21,627	\$29,153	-26%
Arts, Entertainment & Recreation	\$19,100	\$34,103	-44%
Accommodation & Food Services	\$15,392	\$20,577	-25%
All Industry Total	\$35,592	\$52,284	-32%

Source: ESMI, Garner Economics

Figure 7.2
Average Annual Industry Salary Comparison, 2017



Source: ESMI, Garner Economics

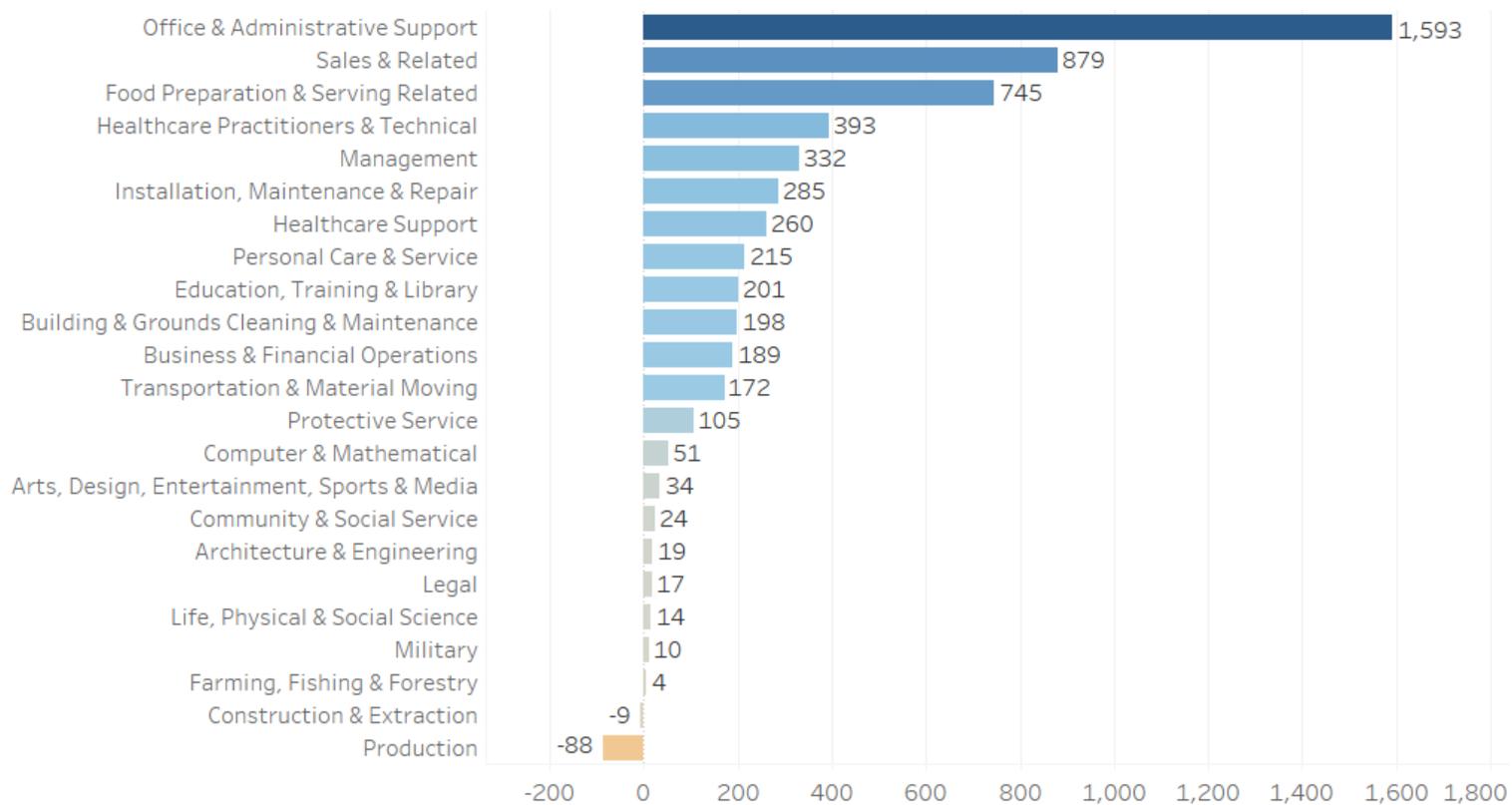
Major Occupational Change

Over the last five years, all but two major occupational categories in Montgomery County added jobs. The strongest job gains were in *Office & Administrative Support*, gaining 1,593 jobs; *Sales and Related*, adding 879 jobs; and *Food Preparation and Serving Related*, growing 745 jobs (Figure 7.3, Table 7.3).

Other occupational groups adding at least 300 jobs over the past five years include the well-paying *Healthcare Practitioners and Technical* and *Management*, with average hourly figures at \$29.39 and \$36.11 respectively.

Only two occupational categories lost jobs—*Production* declined by 88 jobs and *Construction & Extraction* went down slightly by 9 jobs.

Figure 7.3
2012–2017 Employment Change by Occupational Group



Source: ESMI, Garner Economics

Table 7.3
Employment Change by Major Occupational Groups
(Ranked by Absolute Change)

Description	2012 Jobs	2017 Jobs	Difference 2012–2017	% Occupation Change 2012–17
Office and Administrative Support	7,897	9,491	1,593	20%
Sales and Related	6,455	7,334	879	14%
Food Preparation and Serving Related	6,071	6,816	745	12%
Healthcare Practitioners and Technical	2,669	3,063	393	15%
Management	2,829	3,160	332	12%
Installation, Maintenance, and Repair	2,162	2,447	285	13%
Healthcare Support	1,568	1,828	260	17%
Personal Care and Service	2,026	2,241	215	11%
Education, Training, and Library	4,522	4,723	201	4%
Building and Grounds Cleaning and Maintenance	1,905	2,103	198	10%
Business and Financial Operations	1,452	1,641	189	13%
Transportation and Material Moving	2,183	2,355	172	8%
Protective Service	959	1,064	105	11%
Computer and Mathematical	561	612	51	9%
Arts, Design, Entertainment, Sports, and Media	650	684	34	5%
Community and Social Service	965	989	24	3%
Architecture and Engineering	485	504	19	4%
Legal	200	217	17	8%
Life, Physical, and Social Science	182	196	14	8%
Military	635	645	10	2%
Farming, Fishing, and Forestry	92	96	4	4%
Construction and Extraction	2,152	2,143	-9	0%
Production	4,481	4,393	-88	-2%
Total All	53,103	58,746	5,643	11%

Source: ESMI, Garner Economics

Occupational Earnings

A comparison of the same-occupation average hourly earnings for Montgomery County to the national median wage revealed only two occupations that were higher than or equal to the national average: *Military* and *Production* (Figure 7.4, Table 7.4).

Military occupations in Montgomery County pay 70 cents higher per hour than the national rate of \$18.02 and the *Production* average wage was equal to the national rate of \$17.83 an hour.

The average wage for all occupations in Montgomery County was \$18.17, compared to \$23.21 for the national average hourly wage, differing 28 percent.

Figure 7.4
Average Hourly Occupational Earnings Comparison, 2017



Source: ESMI, Garner Economics

Table 7.4
Average Hourly Occupational Earnings Comparison, 2017

SOC	Description	Avg. Hourly Earnings	Avg. Hourly Earnings		
11-0000	Management	\$36.11	\$50.68	(\$14.56)	-40%
13-0000	Business & Financial Operations	\$28.83	\$35.60	(\$6.78)	-24%
15-0000	Computer & Mathematical	\$30.31	\$41.54	(\$11.23)	-37%
17-0000	Architecture & Engineering	\$31.59	\$40.18	(\$8.59)	-27%
19-0000	Life, Physical & Social Science	\$26.91	\$35.06	(\$8.15)	-30%
21-0000	Community & Social Service	\$19.35	\$22.50	(\$3.15)	-16%
23-0000	Legal	\$40.65	\$48.53	(\$7.88)	-19%
25-0000	Education, Training & Library	\$23.89	\$25.68	(\$1.78)	-7%
27-0000	Arts, Design, Entertainment, Sports & Media	\$19.46	\$25.03	(\$5.57)	-29%
29-0000	Healthcare Practitioners & Technical	\$29.39	\$38.34	(\$8.95)	-30%
31-0000	Healthcare Support	\$14.11	\$14.58	(\$0.48)	-3%
33-0000	Protective Service	\$18.21	\$21.97	(\$3.76)	-21%
35-0000	Food Preparation & Serving Related	\$9.71	\$11.47	(\$1.76)	-18%
37-0000	Building & Grounds Cleaning & Maintenance	\$11.41	\$12.92	(\$1.51)	-13%
39-0000	Personal Care & Service	\$10.46	\$12.08	(\$1.61)	-15%
41-0000	Sales & Related	\$14.58	\$19.53	(\$4.95)	-34%
43-0000	Office & Administrative Support	\$15.17	\$17.91	(\$2.74)	-18%
45-0000	Farming, Fishing & Forestry	\$11.59	\$12.98	(\$1.39)	-12%
47-0000	Construction & Extraction	\$16.59	\$21.74	(\$5.15)	-31%
49-0000	Installation, Maintenance & Repair	\$20.65	\$21.88	(\$1.23)	-6%
51-0000	Production	\$17.83	\$17.83	\$0.01	0%
53-0000	Transportation & Material Moving	\$14.51	\$17.30	(\$2.79)	-19%
55-0000	Military	\$18.73	\$18.02	\$0.70	4%
0	Total All Occupations	\$18.17	\$23.21	(\$5.04)	-28%

Source: ESMI, Garner Economics

The following assessment tools include a series of bubble/scatter charts and tables. Axis and quadrant labels should be read as general guides resulting from purely quantitative analysis, not definitive conclusions. Each chart or table is meant as only one piece of a multiple-part analysis. To assist the reader in interpreting the bubble charts, each axis and quadrant is labeled with broad descriptives.

To measure local specialization, location quotients (LQs) for each occupation or industry are calculated. LQs are ratios of an area's distribution of employment for a specific occupation/industry compared to a reference or base area's distribution. In this analysis, the reference area is the United States. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is in the reference area and implies local specialization. LQs are calculated by first dividing local industry employment by the all-industry total of local employment. Second, reference area industry employment is divided by the all-industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

Chart axis definitions:

- **Specialization:** Measured using location quotient (LQ). Reflects the level of relative concentration of a particular occupation/industry to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc., that support this position.
- **Industry Effect:** The portion of growth/decline attributed to a particular industry nationwide. For example, if hospital employment grew by 5 percent nationwide in 2011, we would expect to see the same percentage increase locally, assuming that the forces driving nationwide growth would have a similar local impact.
- **Local Effect:** The proportion of growth/decline not captured by the industry effect, indicating unique local performance. The local effect measures local activity outside the expected nationwide trend. A consistent positive local *Competitive* effect signals superior local performance.

Chart quadrant label definitions:

At-Risk: Locally specialized and recent local job losses.

Competitive: Locally specialized and recent local job gains.

Declining: Not locally specialized and recent local job losses.

Emerging: Not locally specialized and recent local job gains.

- **Local Decline/National Growth:** Industry or occupation gains nationwide and local losses or gains below nationwide trend.
- **Local Growth/National Growth:** Industry or occupation gains nationwide and positive local gains or losses less than nationwide trend.
- **Local Growth/National Decline:** Industry or occupation losses nationwide and positive local gains or losses less than nationwide trend.
- **Local Decline/National Decline:** Industry or occupation losses nationwide and local losses or gains below nationwide trend.

Detailed industry and occupational information can be found in Appendices D and E.

Major Industry Sector Specialization & Growth

Table 7.5
Industry Specialization & Growth

Industry Sector	2012–2017 Employment Change	2017 Location Quotient	2017 Jobs
Competitive			
Accommodation & Food Services	954	1.56	7,923
Retail Trade	1,183	1.50	9,147
Government	1,236	1.33	12,020
Real Estate, Rental & Leasing	282	1.17	1,146
Other Services	208	1.02	2,895
Emerging			
Administrative & Support & Waste Management & Remediation	1,300	0.98	3,620
Health Care & Social Assistance	558	0.92	6,874
Construction	123	0.91	2,931
Information	168	0.84	926
Utilities	36	0.77	159
Finance & Insurance	189	0.61	1,405
Wholesale Trade	75	0.57	1,274
Arts, Entertainment & Recreation	97	0.50	509
Professional, Scientific & Technical Services	93	0.40	1,520
Transportation & Warehousing	93	0.40	822
Management of Companies & Enterprises	13	0.35	297
At-Risk			
Mining, Quarrying, Oil & Gas Extraction	0	1.26	288
Declining			
Manufacturing	-475	0.98	4,539
Educational Services	-67	0.47	714
Agriculture, Forestry, Fishing & Hunting	-26	0.18	126

Major industry sector specialization focuses on the geographic concentrations of similarly classified industries. For many industry sectors there exist interconnections between suppliers, occupations, and associated supporting institutions.

Five industry sectors have a local specialization greater than 1 and experienced job growth in the past five years in Montgomery County. These comprise the *Competitive* category and are:

- *Accommodation & Food Services* (LQ of 1.56)
- *Retail Trade* (LQ of 1.5)
- *Government* (LQ of 1.33)
- *Real Estate, Rental & Leasing* (LQ of 1.17)
- *Other Services* (LQ of 1.02)

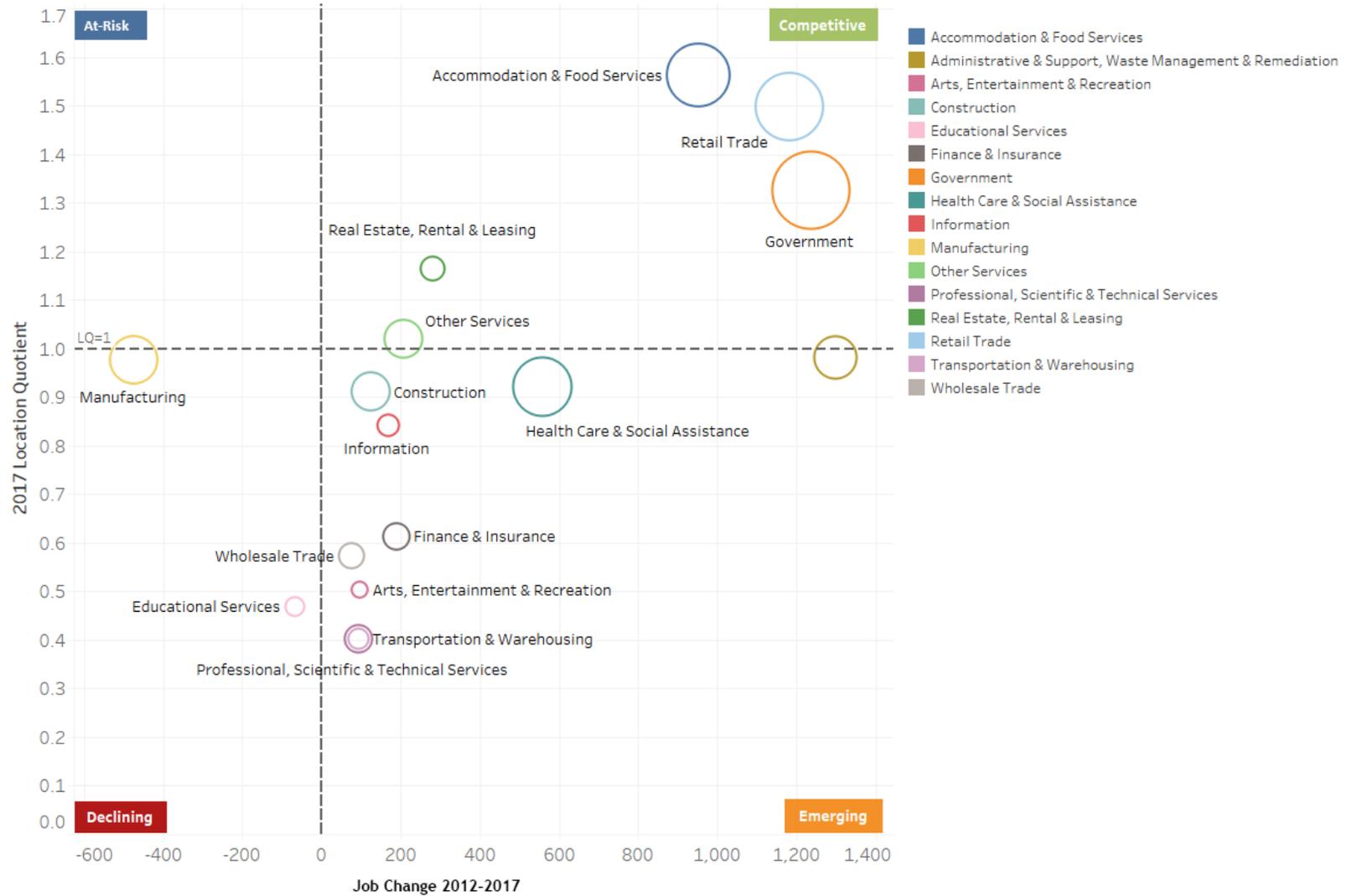
Industries with local specialization below 1 but had job growth within the County over the past five years, placing them in the *Emerging* category (Figure 7.5, Table 7.5).

Mining, Quarrying, Oil & Gas Extraction has a location quotient of 1.26 and remained flat over the past five years. Due to this lack of growth, this sector is placed in the *At-Risk* category.

Three sectors are classified as *Declining*, due to job loss and low local specialization: *Manufacturing, Educational Services, and Agriculture*.

Source: ESMI, Garner Economics

Figure 7.5
Industry Specialization & Growth
Industries with Employment of Approximately 300 and Above, 2017



Source: ESMI, Garner Economics

Industry Competitiveness

Table 7.6
Industry Relative Components of Growth, 2012–2017

Industry Sector	Local Competitive Effect	Industry Effect	2017 Jobs
Local Growth/National Growth			
Accommodation & Food Services	2,142	923	7,923
Management of Companies & Enterprises	330	5	297
Administrative & Support, Waste Management & Remediation	204	168	3,620
Health Care & Social Assistance	77	1,879	6,874
Arts, Entertainment & Recreation	60	69	509
Local Growth/National Decline			
Government	4,165	(814)	12,020
Retail Trade	2,227	(496)	9,147
Real Estate, Rental & Leasing	723	(84)	1,146
Finance & Insurance	457	(121)	1,405
Wholesale Trade	409	(96)	1,274
Other Services	400	(80)	2,895
Information	332	(161)	926
Mining, Quarrying, Oil & Gas Extraction	113	(26)	288
Utilities	80	(10)	159
Local Decline/National Growth			
Transportation & Warehousing	(37)	75	822
Professional, Scientific & Technical Services	(55)	250	1,520
Educational Services	(88)	180	714
Local Decline/National Decline			
Agriculture, Forestry, Fishing & Hunting	(57)	(21)	126
Construction	(64)	(695)	2,931
Manufacturing	(1,219)	(1,685)	4,539

Source: ESMI, Garner Economics

The Competitiveness screen seeks to reveal local competitive advantages (i.e., unique growth beyond predicted industry trends).

- By the *Competitiveness* measure, *Accommodation & Food Services*; *Management of Companies*; *Administrative & Support, Waste Management & Remediation Services*; *Health Care & Social Assistance*; *Arts, Entertainment & Recreation* are the sectors with both local and national growth (Figure 7.6, Table 7.6)
- Nine other industries have local growth with the most significant sectors being *Government*; *Retail Trade*, *Real Estate, Rental & Leasing*; as well as *Finance & Insurance*.
- Three industry sectors had positive industry effect with national growth, but experienced local job loss. These are *Transportation & Warehousing*; *Professional, Scientific & Technical Services*; and *Educational Services*.
- This analysis suggests the County's least competitive sectors are *Construction*, *Manufacturing*, and *Agriculture*.

Figure 7.6
Industry Relative Components of Growth, 2012–2017
Sectors with Employment over 300, 2017



Source: ESMI, Garner Economics

Occupational Specialization & Growth

Table 7.8
Occupational Specialization and Growth, 2012–2017

Description	2012–2017 Change	2017 Location Quotient	2017 Jobs
Competitive			
Education, Training & Library	201	1.41	4,723
Food Preparation & Serving Related	745	1.39	6,816
Sales & Related	879	1.25	7,334
Healthcare Support	260	1.13	1,828
Installation, Maintenance & Repair	285	1.10	2,447
Office & Administrative Support	1,593	1.08	9,491
Community & Social Service	24	1.03	989
Emerging			
Management	332	0.99	3,160
Building & Grounds Cleaning & Maintenance	198	0.96	2,103
Healthcare Practitioners & Technical	393	0.95	3,063
Personal Care & Service	215	0.93	2,241
Military	10	0.88	645
Protective Service	105	0.81	1,064
Arts, Design, Entertainment, Sports & Media	34	0.64	684
Transportation & Material Moving	172	0.61	2,355
Business & Financial Operations	189	0.55	1,641
Architecture & Engineering	19	0.52	504
Legal	17	0.45	217
Life, Physical & Social Science	14	0.42	196
Computer & Mathematical	51	0.37	612
Farming, Fishing & Forestry	4	0.22	96
At-Risk			
Production	(88)	1.27	4,393
Declining			
Construction & Extraction	(9)	0.82	2,143

Source: ESMI, Garner Economics

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors (Figure 7.8, Table 7.8).

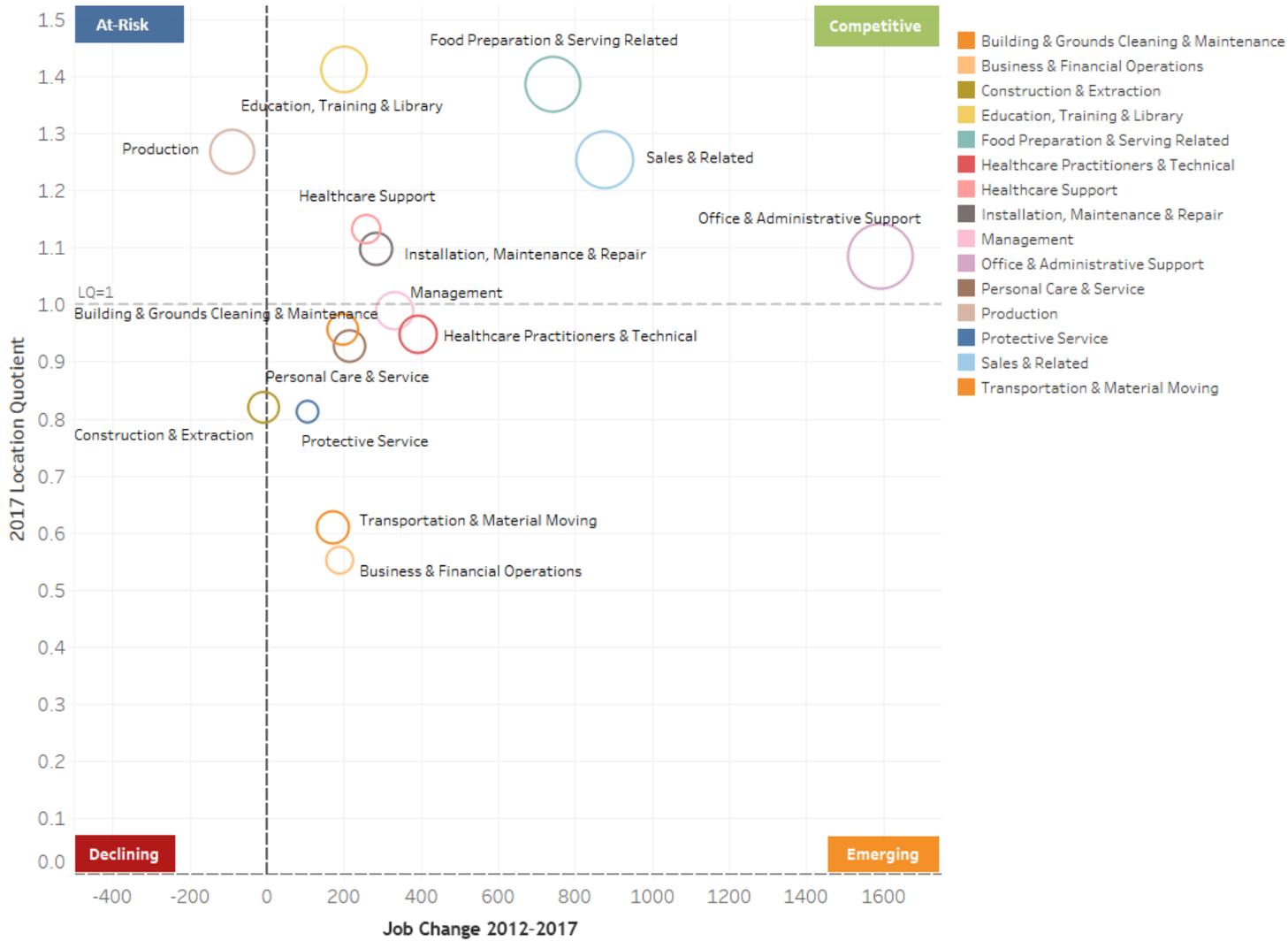
Seven occupational groups are *Competitive*:

- Education, Training & Library (LQ of 1.41)
- Food Preparation & Serving Related (LQ of 1.39)
- Sales & Related (LQ of 1.25)
- Healthcare Support (LQ of 1.13)
- Installation, Maintenance & Repair (LQ of 1.10)
- Office & Administrative Support (LQ of 1.08)
- Community & Social Service (LQ of 1.03)

Most of the remaining occupational groups (14) are classified as *Emerging*, or having job growth with local specialization under 1. Two of these groups had job growth over 200: *Healthcare Practitioners & Technical* and *Personal Care & Services*.

Production occupation is *At-Risk*, due to local job loss and an LQ of 1.27. Finally, the *Construction & Extraction* occupations are classified as *Declining* with job loss and low local specialization.

Figure 7.8
Occupational Specialization & Growth
Occupational Groups with Employment of Approximately 500 and Above, 2017



Source: ESMI, Garner Economics

APPENDIX A: FOCUS GROUP SUMMARY

Note: The comments listed below are summarized from the focus group discussions. The responses are reported as they were offered. They may not necessarily be statements of fact, but may be opinions or perceptions. The number in parentheses indicates the number of focus groups where participants expressed the sentiment or raised the concern.

1. What are several words or phrases that describe the Clarksville and Montgomery County region?

Respondents were mixed in their description of the region, with a balance between the qualities they appreciate and facets of the area they would like to see change. The community's growth and diversity were noted by all of the groups. The groups also frequently noted the community's ties to the military, its welcoming nature, the good work-ethic, and the opportunities that exist. Other less positive descriptors included the traffic problems, urban sprawl, and the lack of a vision or identity. There were comments among several of the groups noting the divisive nature of local politics, the robust market, need for infrastructure improvements and maintenance, and the lack of local or higher-end retail.

- Growing (4)
- Diverse (4)
- Military (3)
- Young (2)
- Urban sprawl (2)
- Hospitable (2)
- Grid-locked (traffic) (2)
- No vision (2)
- Opportunity (2)
- Good work ethic (2)
- Patriotic
- Middle America
- Historic
- Tech savvy
- Blessed by Nashville/cursed by Nashville
- Four Walmarts
- Convenient—access to a major city
- Quality of life
- Underserved from a retail level
- Conflicted government
- Diluted focus
- In need of investment
- More blue-collar than white-collar—growing more blue-collar
- Robust
- Thriving
- Austin Peay
- Reactive
- Transient
- Inferiority complex
- Content
- Quaint

2. What do you think are some of the biggest obstacles that inhibit the City and County in its ability to attract more overnight visitors and increase demand for investment in the *Hospitality* sector or tourism assets (e.g., hotels, attractions)?

Obstacles mirrored the negative descriptors provided in question one. Three of the four focus groups noted the problems with traffic and infrastructure that is either old or inadequate (or both). Respondents in at least two of the focus groups noted the area's lack of identity, transient nature, lack of qualified workforce, and competition for labor from Nashville. Respondents also noted a number of obstacles related to the layout of the area, the acceptance of blue-collar rather than white-collar jobs, the issues with the divided government, and the lack of land and sites.

- Traffic (3)
- Infrastructure (3)
- Lack of identity (2)
- Lack of qualified workforce (2)
- Competition for labor with Nashville (2)
- Transient community (2)
- No consolidated government (2)
- Congestion on I-24; difficult to get to/from Nashville
- Low unemployment
- No plans for accelerated growth—it will all be in the County
- Still a certain degree of small-town mentality
- “Blue-collar” mindset
- Lack of amenities
- Lack of entrepreneurship: “We’re satisfied with new companies coming in.”
- Lack of corporate headquarters
- Lack of available land
- Low income levels

For tourism, specifically:

- No convention center; the community has been discussing it for 25 years, and it was voted down twice
- Nashville: we compete—good and bad
- Other competing places for the Nashville visitors
- Not easily walkable—can’t walk many places here
- Downtown separated from hotels and restaurants

3. On a scale of 1 to 5, with 5 being best, how would you rate the business climate of Montgomery County? Clarksville? In other words, how supportive are local policies to improve the business climate or develop or expand tourism assets? (Note: the question was not asked of the Government/Academia focus group.)

Of the three focus groups that were asked this question, the average score given to the city of Clarksville was 3.09, and the average score given to Montgomery County was 3.79. The respondents of the *Smaller Employers* focus group ranked both the City and County lowest (2.61 and 3.71 respectively). The respondents of the *Large Employers* focus group scored the City the highest (3.41), and respondents of the *Hospitality* sector scored the County highest (3.83).

When asked to explain the reason for their rankings, focus group participants noted the lack of incentives and a perception that the zoning regulations and permitting processes are open to too much interpretation. (From the council level, participants praised the work of the staff: “Our civil servants are definitely servants; they do a damn good job.”) Representatives from companies that do not deal with new builds reported fewer problems.

For the area in general, participants commented that there is a problem with executing or implementing plans.

Participants also noted that the divisiveness between the City and County government is a detriment: “When you have two leadership bodies that disagree on so many things, you discourage business. They will go to other places that only have to deal with one municipality.” Participants noted that it is easier to work with the County than the City and noted that the County tends to follow through better. Several noted that the County is more proactive and aggressive than the City.

Finally, several participants noted the lack of resources (in both bodies) to make any game-changing improvements and the lack of implementation. “There are plans on shelves, a lot of them.” A few participants noted that recruitment of new companies seems to be the predominant focus for both the City and County, with little or not as much attention given to growing or starting businesses.

4. What do you see as the area's strengths?

- K–12 system (4)
- Military retirees (3)
- Austin Peay (3)
- Cost of living (3)
- Sense of community (3)
- Fiber optic network (2)
- Quality of life (2)
- Geographic location (2)
- Wonderful historic settlements
- More excitement about downtown
- Affordable housing
- Recreation
- Positive perception outside of the community

- Growing market
- Climate
- Skilled workforce
- Infrastructure
- Tax structure
- Diversity

For tourism specifically:

- Wonderful historic settlements
- Welcoming feeling
- More excitement about downtown
- Two Rivers Company (TRC) has offered monies to improve destination infrastructure

5. How do you see the current labor situation in the area (quality and employee attraction and availability) to service the *Hospitality* sector? To meet the demands of local employers in general?

Focus group participants noted that finding labor in Clarksville and Montgomery County is very challenging given the tight labor market and the continued growth in the *Manufacturing* sector. Wages have increased to counter the demand, and those who have to compete with Nashville for talent do not offer as high wages and tend to lose out.

The groups noted that the community leverages the workers separating from Fort Campbell and the transient spouses of those stationed there. However, some note that more can be done to keep more of them in the region when they do separate. Participants cited the Workforce Essentials program as a good start.

Participants note that it is often difficult to get part-time or hourly workers and/or workers with trade skills. The former is due to the tight labor marker and different work ethic of those entering the workforce. They also note that, since the market is so tight, hourly workers tend to believe they can

get another job if their current one is too demanding. The lack of workers with trade skills is due to the trend against trades.

Participants also noted that the needed skills do not necessarily map to the graduates of the technical schools or college. Participants noted that both the Tennessee College of Applied Technology (TCAT) and Austin Peay have made changes to their curriculum to address these needs, as has the K–12 system (e.g., early colleges). Participants noted the A&P school near the airport and the addition of a helicopter program at Austin Peay as examples of how the community is being proactive to fill and leverage needed skills. Participants noted the need to partner with the private sector to help create programs to train the local workforce.

Some participants noted that they work to groom their employees from within their company, often training an hourly worker to move into management.

6. What infrastructure is missing or unsatisfactory in the area? What other infrastructure is missing or unsatisfactory in the community in general?

Specific infrastructure that the focus groups found missing or lacking include bike paths, walking paths, high-speed internet, community centers or recreation amenities, and public transportation. The groups also noted that the transportation infrastructure is both aging and not well planned (i.e., not keeping up with growth). Several of the participants noted that the facilities and infrastructure throughout the community is aging and in need of repair. All groups also noted that government in the region is often in conflict and that the lack of a single vision or plan often affects the creation or maintenance of much of the area's infrastructure.

When asked specifically about the area's tourism infrastructure, the *Hospitality* focus group noted that the distance between downtown (attractions) and amenities (hotels, restaurants, etc.) makes it difficult to attract more visitors. They also noted the lack of a convention center and amenities and development along the river as tourism infrastructure that needs improvement.

Responses provided by all groups included:

- Better planned road network/traffic management (3)
- Bike paths (2)
- United plan for growth (2)
- Resources needed to repair, renovate, or refurbish infrastructure (2)
- Riverfront amenities (2)
- High speed internet in the County
- Community center
- Greenway
- Library
- Limited public transportation
- International school
- Sidewalks
- Lack of advocates in state legislature
- Water system is stressed in the industrial area
- Stormwater outside the City limits
- Better air service

7. What would you work to change about the community, not worried about money or politics, to make it a more attractive place to live, work, and visit?

The focus group participants provided a range of options from creating more facilities and spaces for businesses or the destination to grow, getting the private sector more involved in building the community (for engagement and resources), and finding a way to either consolidate government or encourage the County and City to work better together. The groups noted the need to make changes to make Clarksville a destination

and place where talent (especially that from Fort Campbell) and more white-collar, professional jobs, will want to settle.

Individual focus groups also noted the desire to clean up the area (focus on aesthetics so it does not look like a tired community), to support local businesses, and leverage the power of a regional approach.

8. Give some examples of unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the region? *The Hospitality focus group was asked to “Give some examples of local unique and innovative programs or initiatives that you believe are having a positive impact on increasing visitation to the region (both day visitors and overnight stays).”*

Most responses centered on the quality of place assets the community is building and supporting, including the more active downtown, community festivals, distilleries, and the historic sites (e.g., Collinsville). Respondents also noted the proactive stance of Austin Peay in adding relevant courses to its curricula and engaging with the community. Several of the participants noted the increasing programming on the K–12 level, specifically the early college option.

Specific comments included:

- Downtown commons/downtown redevelopment
- Riverfest
- Historic Collinsville
- Local distilleries
- Athletic program at Austin Peay
- Art and public art
- Riverboat
- Tourism fund
- ASPIRE
- Austin Peay
- Early college program
- Publicly owned land (for development)
- Career skills programs at Fort Campbell

9. Are there programs in peer/competitor regions that the region should consider for the area? If so, give examples.

Participants in several of the groups noted the need to better leverage the river and riverfront. Specifically for the tourism economy, participants noted the turnaround of the Tacoma, Washington, waterfront and suggested some best practices could be gleaned from Tacoma’s experience.

Other participants noted the lack of corporate support for initiatives in Clarksville and suggested finding ways to get the private sector more involved.

One focus group suggested creating an innovation district like Chattanooga’s to leverage the broadband access in Clarksville.

Another theme carried out in more than one of the groups is the need to further strengthen education opportunities in the area and to make sure they are aligned with future opportunities. The conversations noted efforts at other universities to not only train future workers, but also to support budding businesses (e.g., University of Arizona business accelerator). Other conversations suggested more work to clearly define career pathways.

A final recommendation shared by more than one of the groups is the need to find a way to consolidate government or make it more efficient. One group noted the lessons from an intercity visit to Salt Lake City.

10. What types of companies do you think would be a good fit for the Clarksville and Montgomery County region and why?

Participants offered the following suggestions:

- Tech sector: leverage gig-speed internet in the City (4)
- Defense or military related industry—with Fort Campbell (3)
- General professional services (3)
- Local restaurants (2)
- General professional services (2)
- Something for military wives
- Call centers
- Tourist attractions/entertainment/recreation providers
- Lifestyle center
- Corporate headquarters
- Medical headquarter company
- Military manufacturing
- Aviation
- Anything related to autos
- Healthcare—testing and providers

11. What are your past experiences with, and current perceptions of, the various economic development efforts by group(s) involved in investment attraction, retention, and assisting entrepreneurs? How could these efforts or groups be improved? *(Participants of the Hospitality focus group were asked: “What are your past experiences with, and current perceptions of, the various economic development efforts by group(s) involved in investment attraction, retention, tourism promotion, and assisting entrepreneurs? How could these efforts or groups be improved?”)*

Participants give the EDC high marks for what the groups have been able to accomplish given the resources they have and the need to interact and take direction from both the City and the County. Several focus group respondents noted that the staff is proactive and helpful. Negative comments centered around the divisions between the city and county government and reflected earlier comments about the council decisions often being unpredictable. They also noted that the clash between the City and County affects economic development and tourism efforts because of sometimes conflicting priorities, the lack of a unified vision, and the balkanization of resources.

Participants also noted that there is no common vision for economic development, and it often seems as though business recruitment takes more precedence than small business development, new company

support, or business retention and expansion. Other participants noted the proactive efforts of the Tennessee Board of Regents to address workforce training needs.

Two of the groups noted the lack of strong private sector engagement in economic development effort.

Focus group participants understood the connection between economic, tourism, and community development and lauded the EDC for looking at all three.

Lastly, several of the focus groups noted that the area has not fully leveraged the gig status of the city. They suggested that much of the lack of branding for the area could also take advantage of this differentiator.

APPENDIX B: SURVEY RESPONSES

1. What are several words or phrases that describe Clarksville and Montgomery County? (Choose up to five responses.)

Response Option	# rec'd
Military	145
Affordable	109
Friendly, welcoming	87
Lack of a shared vision	74
Diverse	74
Sprawling	69
Small-town mentality	57
Slow to change	56
Strong educational assets (primary and secondary)	44
Outdoor and natural recreation	43
Historic	41
Fragmented	36
Attractive/picturesque	35
Collaborative	6
Risk averse	4

Other responses not noted above included:

- Divided government (14)
- Growing (4)
- Positive attitude
- Need more entertainment, events, activities downtown

2. What do you think are some of the biggest obstacles that inhibit the region in its ability to attract, expand, or retain businesses and investment? (Choose up to five responses.)

Response Option	# rec'd
Lack of consensus/focus for long-term vision	97
Divided government structure	95
No quality of place amenities to attract a young, skilled workforce	70
Inability of community to keep up with growth	68
Infrastructure is not well maintained	64
Perception of being primarily a military community	63
Overshadowed by Nashville	61
Aging transportation infrastructure	49
Aesthetics of the community	37
Too averse to risk or new ideas	36
Too much reliance on certain industry sectors	36
Difficult to find skilled labor	35
Limited availability of local venture capital	23
Lack of public transportation	22
Lack of strong workforce development programs	16

3. On a scale of 1 to 5, with 5 being “Very Strong,” how would you rate the business climate of Montgomery County (with business climate defined as those policies and laws enacted by the County that impact local businesses, either positively or negatively)? Clarksville?

Response Option	Montgomery County	Clarksville
1 - Very Weak	1	5
2 - Weak	6	20
3 - Average	51	75
4 - Strong	77	63
5 - Very Strong	45	20

4. What do you see as the community's strengths (Choose up to five.)?

Response Option	# rec'd
Austin Peay State University	140
Low cost of living	113
Geographic location	112
Good K–12 schools	83
Proximity to Fort Campbell	66
Existing industry and recent locates	57
Family-friendly atmosphere	55
Trained military workforce	53
Access to outdoor recreation	50
Fiber optic network	33
Not too large of a community/manageable scale	31
Low cost of utilities	28
Quality of place	20

Other comments included:

- Rail service
- Strong industrial recruitment program
- Proximity to Nashville

5. How do you see the current labor situation in the area (both quality and employee attraction and availability)? (Select all that apply.)

Response Option	# rec'd
Must compete with Nashville/other areas for talent	116
Tight overall labor market	72
Difficult to attract non-manufacturing workers	71
Lack of workers with trade skills	68
Easy to leverage spouses of military personnel	42
Strong work ethic	35
No problems with the workforce	15

Other comments included:

- Need more white-collar jobs, business/office development
- Federal regulations encourage many to stay home
- Difficult to get highly educated people (e.g., engineers)

6. For the purposes of this question, hard infrastructure is defined as the physical networks such as roadways, sewer, broadband internet, airports and/or ports; soft infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the healthcare system, system of government, and/or parks. What hard or soft infrastructure is weak or missing in the area? (Choose up to five responses.)

Response Option	# rec'd
Poor road maintenance/traffic flow	135
Underutilized riverfront	116
Convention center	100
Multipurpose center	88
Lack of walkability and bike-ability	87
Higher-level retail (non-chains)	84
Broadband outside City limits	80
Limited local public transportation	37
Community facilities are old or in need of renovation	34

Other comments included:

- Port
- Healthcare

7. Without worrying about money or politics, please indicate the top five items you would work to change about the community. Use 1 to indicate the most important item, use 2 to indicate the second most important, 3 to indicate the third most important item, 4 to indicate the fourth most important item, and 5 to indicate the fifth most important item:

The options were ranked as follows:

<i>Initiative</i>	<i>1st Priority</i>	<i>2nd Priority</i>	<i>3rd Priority</i>	<i>4th Priority</i>	<i>5th Priority</i>
Invest in and build a 21st century infrastructure	37	35	22	27	23
Work to consolidate government	33	16	23	14	22
Build a consensus vision and unified brand for Clarksville	29	24	17	20	31
Create a strategy to attract more white-collar or corporate jobs	27	18	38	30	21
Undertake aggressive infrastructure growth downtown	25	21	30	26	24
Strengthen ties between education assets, industry, and workforce programs	21	25	23	16	23
Build some type of event center to make Clarksville a destination	18	29	23	36	24
Create transit options to/from Nashville	8	28	18	24	21

Is there another initiative you would suggest?

- Quality of life initiatives and a focus on HEALTH. We need more green spaces—we have a dire lack of big, nice parks to be active with our friends and families (2)
- Place significant emphasis on attracting (internal or external) investment that would leverage our young population, abundant talent, lower cost of living, central location, and natural beauty. This would give residents of multiple generations several career opportunities and would spark entrepreneurial activities.
- Better places to eat, with good service
- Convention Center (2)
- Local healthcare development
- Make entrepreneurship a focus
- Incentivize White-Collar Headquarters Downtown, not unlike the incentives for industry at Industrial Park
- Create more opportunities for kids to have as after school programs
- Design overlay, TIF for the frontage of Providence Boulevard and Fort Campbell Boulevard
- Build schools with more capacity so there isn't a new school needed every year

Other initiatives, continued

- Expand our industrial park and have pad-ready sites
- Create more housing opportunities to benefit consumers who are on fixed incomes
- Work to improve planning as it relates to subdivisions and roads/streets
- Put an emphasis on the arts (including music) to attract the high-tech companies
- Expand fiber to rural areas
- Increase tourism with an amusement park/s
- We definitely need more sidewalks and activities for children and families

8. Give some examples of local, unique, and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of Clarksville and Montgomery County?

Examples most frequently offered include:

- Downtown Commons (16)
- Downtown TIF/Strawberry Alley Ale Works (9)
- Economic organizations and initiatives (8)
- The Aspire Foundation (6)
- High school programs (Academy System, internships, high school on TCAT Campus) (4)
- VisitClarksvilleTN (3)
- City and County investing in land for industrial development (3)
- Workforce Essentials (3)
- Developing the marina (3)
- Clarksville's Parks and Recreation Department (3)
- Greenway & Blueway (3)
- APSU development activity with Two Rivers and County (3)
- CDE's broadband strength (2)
- Fort Campbell (2)
- Relationship between City and County with Fort Campbell.
- Plan for the Family Athletic Complex at Exit 8
- New industries
- Housing market
- Public transportation for Senior citizens
- Healthy Montgomery Farmer's Market
- Cheap electricity
- Soldier for Life Program
- Consolidated School System
- Knott family developments, competitive housing markets
- Gateway Chamber Orchestra

9. Which of the programs below in peer/competitor regions should be considered for this area? (Choose up to five responses.)

Response option	# rec'd
Developments that leverage the riverfront	137
City- or County-funded capital area improvement programs for sports, recreation, entertainment, cultural and convention facilities	128
Initiatives that are focused on making downtown a destination	127
Initiatives that support local businesses; shop local programs	113
Partnerships with higher education institutes to enhance workforce training or apprenticeships	111
Communities that created incubator or accelerator space to encourage entrepreneurship	82
Communities that cultivated/built an arts district	56

Are there other programs in peer/competitor regions that the region should consider for the area? If so, give examples.

- Chattanooga, Tennessee (e.g., incentives for housing downtown, incubator spaces, and public/private connections to promote existing and bring in new businesses) (4)
- Arts & entertainment downtown (3)
- Downtown revitalization initiatives (e.g., Paducah, Kentucky, multi-use buildings) (3)
- Entrepreneurial development center (e.g., Jackson, Tennessee) (2)
- AdventureWorks or SOAR (Franklin, Tennessee)
- Buffalo Bayou Partnership (Houston, Texas)
- Discovery Green (Houston, Texas)
- Downtown Stadium (Bowling Green, Kentucky)
- Youth sports tourism development and facilities
- Knoxville, Tennessee
- Memphis, Tennessee
- Cincinnati, Ohio
- Gallatin, Tennessee
- Huntsville, Alabama
- Revitalization of vacant old buildings and neighborhoods
- Initiatives that support local businesses; shop local programs

10. What types of companies do you think would be a good fit for Clarksville and Montgomery County?

Response Option	# rec'd
Technology/IT	134
Military or defense-related companies	133
Professional services (white-collar)	101
Innovative/advanced manufacturing	101
Outdoor recreation providers	96
Distribution centers	83
Aviation-related companies	81
Call centers & back office operations	42
Food & beverage processing facilities	30

Other suggestions:

- Businesses that can leverage Outlaw Field Airport (2)
- Auto manufacturing
- Businesses with dense space/land usage

APPENDIX C: ASSETS & CHALLENGES ENDNOTES

ACCESS TO MARKETS

¹ 400-Mile Radius Results

Geography Name	Year	Total Population
Clarksville, TN	2017	68,593,957

Source: U.S. Census Bureau

² I-24 E/W. Most national distribution facilities prefer a combination N/S-E/W access point.

³ FTZ #78 (subzone from Nashville); Montgomery County barge port

⁴ I-24 E/W with three exits

⁵ One short line railroad, RJ Corman, with connections to CSX mainline

⁶ Montgomery County barge port on the Cumberland River has limited service.

⁷ Nashville International Airport (BNA)

⁸ Clarksville Regional Airport <https://www.airnav.com/airport/KCKV>

⁹ 2017 Broadband Access & Speed Available, Percent of Population (Highest Relative Figure Shaded)

Broadband Access	Clarksville, TN	Florence, SC	Huntsville, AL	Tennessee
25 Mbps or faster	96.5%	94.0%	92.9%	90.1%
100 Mbps or faster	96.5%	5.2%	80.0%	87.1%
1 gigabit	66.5%	5.2%	0.0%	18.8%

LABOR

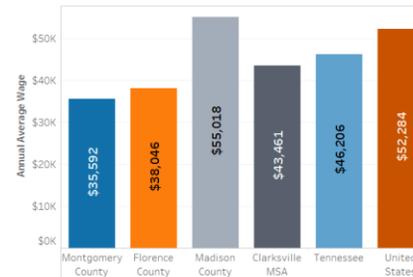
¹⁰ LQ range of 1.0 to 21.39

¹¹ LQ of 1.0

¹² LQ > 1.5

¹³ LQ > 1.43

¹⁴ 2017 Annual Wages



¹⁵

	Private	Public	Total
Clarksville MSA	4.8%	8.0%	5.8%
Florence MSA	1.5%	7.9%	2.6%
Huntsville MSA	1.8%	20.3%	5.5%
Tennessee	3.5%	19.4%	5.7%
United States	6.5%	34.4%	10.7%

¹⁶ Multiple institutions offer various certificates and degrees, including training for aviation mechanics. www.clarksvilletned.com/idb/training-education/; <https://tcatdickson.edu/about/college>

¹⁷ FastTrack Job Training Assistance Program

¹⁸ Austin Peay State University www.apsu.edu/

¹⁹ APSU www.apsu.edu/costem/index.php

ACCESS TO RESOURCES

²⁰ Montgomery County ranks 25 out of 95 counties in Tennessee in the value of ag products sold. Value of sales by commodity include grains, beans, and oilseed.

²⁰ 90 per BLS Q3 2017

²²

Description	2017 Payrolled Business Locations
Professional, Scientific, and Technical Services	246
Other Services (except Public Administration)	272

²³

Utility	Provider	Average Price	
Electric	City of Clarksville (Tennessee)	7.32	(cents/kWh)
Electric	Cumberland Elec Member Corp	6.15	(cents/kWh)
Electric average		6.73	(cents/kWh)

Gas	Clarksville Gas Department	\$3.92
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Source: EIA—US Energy Information Administration, 2016

²⁴ Three FTEs for ED; 6.5 for the CVB

COUNTY ECONOMIC DEVELOPMENT/TOURISM PROGRAMS

²⁵ County and City governments are engaged, and the private sector is involved through a program named Aspire. clarksvillepartnership.com/aspire-main/history/

²⁶ The EDC is undertaking its third strategic plan in 12 years.

²⁷ Based on focus groups' feedback, there is a disconnect between City and County government leadership that trickles over into economic development efforts.

²⁸ Based on observations from the focus groups and community survey

²⁹ \$1.6MM for ED and \$1.5MM for the CVB

³⁰ Montgomery County Corporate Business park (North and South Park). 1,200 acres of available land. www.clarksvilletned.com/idb/corporate-business-park/; In the planning stages, the Middle Tennessee Mega Site, 1,800 acres with 2/3 in Montgomery County and 1/3 in Robertson County.

ACCESS TO SPACE

³¹ Six available properties as of 4/15/18, according to the EDC website, ranging in size from 20,000 sq. ft. to 75,000 sq. ft.

³² Limited Class A office space according to the EDC website as of 4/15/18

ACCESS TO CAPITAL

³³ Offered by the IDB www.clarksvilletned.com/idb/incentives/

GOVERNMENT IMPACT ON BUSINESS

³⁴ Per the EDC: Water Capacity 28,000,000 GPD

Storage Capacity 24,750,000 Gallons

Current Consumption 14,000,000 GPD; the Clarksville Gas and Water Department and the City of Clarksville own land to build future second water treatment facility, currently under design with a scheduled online date in 2020; Wastewater Capacity: 25,000,000 GPD, Usage: 10,000,000 GPD

³⁵ <http://www.clarksvilletned.com/idb/incentives/>;
www.clarksvilletned.com/clientuploads/PDF%20files%20IDB/Clarksville%20-%20Montgomery%20County%20IDB%20TIF%20Policies%20and%20Procedures%20Final%206-1-2016.pdf

³⁶ **Composite ACT Scores**
Highest Score Shaded

	2013	2014	2015	2016	2017
Montgomery County	19.5	19.6	19.4	20.0	20.2
Florence County	18.6	18.6	19.2	17.2	17.5
Madison County	n/a	n/a	19.8	21.1	n/a
Tennessee	19.1	19.3	19.4	19.9	20.1
United States	20.9	21.0	21.0	20.8	21.0

³⁷ Multiple institutions <http://www.clarksvilletned.com/idb/training-education/>;
<https://tcatdickson.edu/about/college>

³⁸ Based on responses from the focus group respondents and the question related to the business climate of the City and County. The County business climate ranked higher.

³⁹ Median property tax of \$1,118. www.tax-rates.org/tennessee/property-tax

QUALITY OF PLACE

⁴⁰ 248 active listings with sale prices from \$300,000 to no limit, according to Zillow as of 4/23/2018

⁴¹ 1,061 active listings with sale prices from \$120,000 to \$299,999, according to Zillow as of 4/23/2018

⁴² 574 rentals available in all of Montgomery County as of 4/23/2018, according to apartments.com

⁴³ **Cost-of-Living Index, 2017**
Lowest Figure Shaded

Category	Clarksville	Florence	Huntsville	Tennessee
Cost-of-Living Index	94	99	99	90
Goods & Services Index	99	106	107	97
Grocery Index	100	106	96	93
Healthcare Index	92	95	97	89
Housing Index	81	82	88	80
Transportation Index	95	92	95	90
Utilities Index	109	127	110	95

Source: AreaVibes.com derived from C2ER Index for 2017, Garner Economics

⁴⁴ **Crime Rates**
Lowest Rate Shaded

	Property Crime		Violent Crime	
	Crimes Reported	Crime Rate	Crimes Reported	Crime Rate
Montgomery County	4,514	2,317.3	1,053	540.6
Florence County	5,593	4,039.8	862	622.6
Madison County	12,695	3,562.9	2,339	656.4
Clarksville MSA	6,311	2,213.6	1,219	427.6
Tennessee	189,835	2,854.1	42,097	632.9
United States	7,919,035	2,450.7	1,248,185	386.3

Source: Uniform Crime Reports, FBI, Garner Economics

⁴⁵ visitclarksvilletn.com/

⁴⁶ <http://www.cityofclarksville.com/index.aspx?page=141>

⁴⁷ <http://www.usa.com/clarksville-tn-natural-disasters-extremes.htm#TornadoIndex>

⁴⁸ Based on the visual entries to the community from the interstate and state/local gateways.

⁴⁹ Based on feedback from focus groups participants.

⁵⁰ Nine AAA three-diamond hotels. No four- or five-diamond properties.

⁵¹ Mostly fast food and menu-ordered chains

APPENDIX D: INDUSTRY DETAILS

Specialized industries are highlighted light blue for location quotients greater than 1.20

NAICS	Description	2017 Jobs	2012–2017 Change	2017 Location Quotient	2017 Wages
11	Agriculture, Forestry, Fishing and Hunting	126	(26)	0.18	\$24,131
111	Crop Production	32	(12)	0.11	\$25,685
112	Animal Production and Aquaculture	15	(26)	0.10	\$23,943
113	Forestry and Logging	23	6	0.79	\$27,132
114	Fishing, Hunting and Trapping	<10	Insf. Data	0.31	Insf. Data
115	Support Activities for Agriculture and Forestry	51	3	0.25	\$22,770
21	Mining, Quarrying, and Oil and Gas Extraction	288	(0)	1.26	\$71,096
211	Oil and Gas Extraction	<10	Insf. Data	0.05	Insf. Data
212	Mining (except Oil and Gas)	285	(3)	4.23	\$71,369
22	Utilities	159	36	0.77	\$69,707
221	Utilities	159	36	0.77	\$69,707
23	Construction	2,931	123	0.91	\$39,624
236	Construction of Buildings	609	(18)	0.81	\$44,893
237	Heavy and Civil Engineering Construction	355	89	0.94	\$48,646
238	Specialty Trade Contractors	1,967	51	0.94	\$36,362
31	Manufacturing	4,539	(475)	0.98	\$55,317
311	Food Manufacturing	29	(16)	0.05	\$61,860
312	Beverage and Tobacco Product Manufacturing	139	6	1.45	\$20,348
313	Textile Mills	56	5	1.32	\$69,493
314	Textile Product Mills	416	(21)	8.99	\$49,925
315	Apparel Manufacturing	<10	Insf. Data	0.15	Insf. Data
316	Leather and Allied Product Manufacturing	<10	Insf. Data	0.09	Insf. Data
321	Wood Product Manufacturing	55	(25)	0.36	\$54,636
322	Paper Manufacturing	218	(270)	1.60	\$42,275
323	Printing and Related Support Activities	217	56	1.27	\$52,867
324	Petroleum and Coal Products Manufacturing	<10	Insf. Data	0.22	Insf. Data
325	Chemical Manufacturing	85	44	0.28	\$80,418
326	Plastics and Rubber Products Manufacturing	271	173	1.03	\$59,881

NAICS	Description	2017 Jobs	2012-2017 Change	2017 Location Quotient	2017 Wages
327	Nonmetallic Mineral Product Manufacturing	568	(339)	3.66	\$54,592
331	Primary Metal Manufacturing	83	(156)	0.61	\$62,498
332	Fabricated Metal Product Manufacturing	144	2	0.27	\$38,590
333	Machinery Manufacturing	1,142	(183)	2.88	\$54,713
334	Computer and Electronic Product Manufacturing	<10	Insf. Data	0.01	Insf. Data
335	Electrical Equipment, Appliance, and Component Manufacturing	37	(1)	0.26	\$78,152
336	Transportation Equipment Manufacturing	964	205	1.58	\$66,188
337	Furniture and Related Product Manufacturing	18	Insf. Data	0.12	\$34,350
339	Miscellaneous Manufacturing	75	30	0.32	\$33,945
42	Wholesale Trade	1,274	75	0.57	\$55,353
423	Merchant Wholesalers, Durable Goods	561	70	0.50	\$49,620
424	Merchant Wholesalers, Nondurable Goods	609	24	0.78	\$55,633
425	Wholesale Electronic Markets and Agents and Brokers	104	(19)	0.31	\$84,749
44	Retail Trade	9,147	1,183	1.50	\$27,530
441	Motor Vehicle and Parts Dealers	1,200	71	1.58	\$55,400
442	Furniture and Home Furnishings Stores	249	11	1.34	\$31,827
443	Electronics and Appliance Stores	264	(32)	1.34	\$36,598
444	Building Material and Garden Equipment and Supplies Dealers	732	83	1.51	\$33,716
445	Food and Beverage Stores	1,050	251	0.90	\$21,811
446	Health and Personal Care Stores	443	92	1.09	\$33,320
447	Gasoline Stations	496	50	1.43	\$20,103
448	Clothing and Clothing Accessories Stores	691	123	1.31	\$14,335
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	432	192	1.81	\$17,106
452	General Merchandise Stores	2,745	167	2.33	\$22,716
453	Miscellaneous Store Retailers	599	111	1.69	\$17,195
454	Nonstore Retailers	246	63	0.96	\$22,368
48	Transportation and Warehousing	822	93	0.40	\$44,804
482	Rail Transportation	34	9	0.41	\$116,498
483	Water Transportation	<10	Insf. Data	0.05	Insf. Data
484	Truck Transportation	465	10	0.76	\$39,323
485	Transit and Ground Passenger Transportation	32	(8)	0.14	\$21,126

NAICS	Description	2017 Jobs	2012-2017 Change	2017 Location Quotient	2017 Wages
486	Pipeline Transportation	0	0	0.00	\$0
487	Scenic and Sightseeing Transportation	0	0	0.00	\$0
488	Support Activities for Transportation	79	22	0.30	\$54,698
491	Postal Service	0	0	0.00	\$0
492	Couriers and Messengers	171	50	0.67	\$48,955
493	Warehousing and Storage	40	8	0.11	\$29,446
51	Information	926	168	0.84	\$50,681
511	Publishing Industries (except Internet)	537	191	1.90	\$54,461
512	Motion Picture and Sound Recording Industries	80	(35)	0.42	\$19,337
515	Broadcasting (except Internet)	95	5	0.91	\$24,664
517	Telecommunications	201	64	0.67	\$65,472
518	Data Processing, Hosting, and Related Services	<10	Insf. Data	0.03	Insf. Data
519	Other Information Services	<10	Insf. Data	0.08	Insf. Data
52	Finance and Insurance	1,405	189	0.61	\$56,595
522	Credit Intermediation and Related Activities	1,072	103	1.09	\$57,978
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	51	2	0.14	\$81,836
524	Insurance Carriers and Related Activities	282	84	0.30	\$46,768
53	Real Estate and Rental and Leasing	1,146	282	1.17	\$33,734
531	Real Estate	945	273	1.23	\$32,703
532	Rental and Leasing Services	200	7	0.96	\$38,516
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	<10	Insf. Data	0.11	Insf. Data
54	Professional, Scientific, and Technical Services	1,520	93	0.40	\$49,880
541	Professional, Scientific, and Technical Services	1,520	93	0.40	\$49,880
55	Management of Companies and Enterprises	297	14	0.35	\$51,685
551	Management of Companies and Enterprises	297	14	0.35	\$51,685
56	Administrative and Support and Waste Management and Remediation Services	3,620	1,300	0.98	\$26,129
561	Administrative and Support Services	3,466	1,220	0.98	\$25,378
562	Waste Management and Remediation Services	154	81	0.97	\$43,082
61	Educational Services	714	(67)	0.47	\$22,675
611	Educational Services	714	(67)	0.47	\$22,675

NAICS	Description	2017 Jobs	2012-2017 Change	2017 Location Quotient	2017 Wages
62	Health Care and Social Assistance	6,874	558	0.92	\$39,910
621	Ambulatory Health Care Services	2,992	735	1.07	\$54,238
622	Hospitals	881	(116)	0.48	\$47,454
623	Nursing and Residential Care Facilities	1,294	(78)	1.04	\$29,758
624	Social Assistance	1,708	19	1.09	\$18,610
71	Arts, Entertainment, and Recreation	509	97	0.50	\$19,100
711	Performing Arts, Spectator Sports, and Related Industries	142	11	0.46	\$21,582
712	Museums, Historical Sites, and Similar Institutions	15	(1)	0.25	\$30,650
713	Amusement, Gambling, and Recreation Industries	352	86	0.55	\$17,598
72	Accommodation and Food Services	7,923	954	1.56	\$15,392
721	Accommodation	592	37	0.81	\$16,265
722	Food Services and Drinking Places	7,331	917	1.69	\$15,321
81	Other Services (except Public Administration)	2,895	208	1.02	\$21,627
811	Repair and Maintenance	707	186	1.13	\$31,991
812	Personal and Laundry Services	880	104	1.10	\$20,890
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	1,093	(98)	1.01	\$16,944
814	Private Households	215	16	0.65	\$14,361
90	Government	12,020	1,236	1.33	\$42,257
901	Federal Government	2,342	572	1.29	\$56,131
902	State Government	2,426	(210)	1.23	\$35,212
903	Local Government	7,252	875	1.37	\$40,132
	All Industry	59,134	6,040		\$35,592

Source: ESMI, Garner Economics

APPENDIX E: OCCUPATION DETAILS

Specialized occupational categories are highlighted light blue for location quotients greater than 1.20

SOC	Description	2017 Jobs	2012–2017 Change	2017 Location Quotient	Avg. Hourly Earnings
11-0000	Management Occupations	3,160	332	0.99	\$36.11
11-1000	Top Executives	728	63	0.76	\$45.61
11-2000	Advertising, Marketing, Promotions, Public Relations, and Sales Managers	130	10	0.49	\$48.20
11-3000	Operations Specialties Managers	437	43	0.66	\$39.98
11-9000	Other Management Occupations	1,866	216	1.43	\$30.74
13-0000	Business and Financial Operations Occupations	1,641	189	0.55	\$28.83
13-1000	Business Operations Specialists	1,050	141	0.56	\$28.83
13-2000	Financial Specialists	591	48	0.54	\$28.82
15-0000	Computer and Mathematical Occupations	612	51	0.37	\$30.31
15-1100	Computer Occupations	591	45	0.37	\$30.19
15-2000	Mathematical Science Occupations	21	5	0.32	\$33.52
17-0000	Architecture and Engineering Occupations	504	19	0.52	\$31.59
17-1000	Architects, Surveyors, and Cartographers	32	2	0.42	\$24.12
17-2000	Engineers	241	2	0.38	\$39.11
17-3000	Drafters, Engineering Technicians, and Mapping Technicians	231	14	0.87	\$24.88
19-0000	Life, Physical, and Social Science Occupations	196	14	0.42	\$26.91
19-1000	Life Scientists	21	(4)	0.19	\$31.65
19-2000	Physical Scientists	19	(2)	0.19	\$34.56
19-3000	Social Scientists and Related Workers	46	2	0.39	\$35.68
19-4000	Life, Physical, and Social Science Technicians	109	18	0.79	\$21.22
21-0000	Community and Social Service Occupations	989	24	1.03	\$19.35
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	752	36	0.96	\$19.58
21-2000	Religious Workers	238	(12)	1.36	\$18.63
23-0000	Legal Occupations	217	17	0.45	\$40.65
23-1000	Lawyers, Judges, and Related Workers	166	17	0.51	\$46.76
23-2000	Legal Support Workers	51	(1)	0.32	\$20.94

SOC	Description	2017 Jobs	2012–2017 Change	2017 Location Quotient	Avg. Hourly Earnings
25-0000	Education, Training, and Library Occupations	4,723	201	1.41	\$23.89
25-1000	Postsecondary Teachers	580	(182)	1.05	\$37.78
25-2000	Preschool, Primary, Secondary, and Special Education School Teachers	1,688	129	1.08	\$25.58
25-3000	Other Teachers and Instructors	1,698	219	3.24	\$21.00
25-4000	Librarians, Curators, and Archivists	94	5	0.91	\$25.47
25-9000	Other Education, Training, and Library Occupations	663	30	1.11	\$14.36
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	684	34	0.64	\$19.46
27-1000	Art and Design Workers	147	10	0.46	\$16.27
27-2000	Entertainers and Performers, Sports and Related Workers	251	10	0.81	\$20.58
27-3000	Media and Communication Workers	169	8	0.57	\$22.20
27-4000	Media and Communication Equipment Workers	117	7	0.84	\$17.12
29-0000	Healthcare Practitioners and Technical Occupations	3,063	393	0.95	\$29.39
29-1000	Health Diagnosing and Treating Practitioners	1,467	174	0.73	\$39.13
29-2000	Health Technologists and Technicians	1,519	203	1.32	\$20.02
29-9000	Other Healthcare Practitioners and Technical Occupations	76	16	1.23	\$28.95
31-0000	Healthcare Support Occupations	1,828	260	1.13	\$14.11
31-1000	Nursing, Psychiatric, and Home Health Aides	868	50	0.92	\$12.34
31-2000	Occupational Therapy and Physical Therapist Assistants and Aides	95	46	1.38	\$22.47
31-9000	Other Healthcare Support Occupations	865	164	1.44	\$15.01
33-0000	Protective Service Occupations	1,064	105	0.81	\$18.21
33-1000	Supervisors of Protective Service Workers	196	34	1.91	\$21.01
33-2000	Fire Fighting and Prevention Workers	141	20	1.14	\$17.17
33-3000	Law Enforcement Workers	444	63	0.93	\$19.01
33-9000	Other Protective Service Workers	283	(12)	0.46	\$15.56
35-0000	Food Preparation and Serving Related Occupations	6,816	745	1.39	\$9.71
35-1000	Supervisors of Food Preparation and Serving Workers	572	72	1.42	\$13.73
35-2000	Cooks and Food Preparation Workers	2,095	222	1.71	\$9.66
35-3000	Food and Beverage Serving Workers	3,692	424	1.34	\$9.18
35-9000	Other Food Preparation and Serving Related Workers	457	27	0.87	\$9.10

SOC	Description	2017 Jobs	2012–2017 Change	2017 Location Quotient	Avg. Hourly Earnings
37-0000	Building and Grounds Cleaning and Maintenance Occupations	2,103	198	0.96	\$11.41
37-1000	Supervisors of Building and Grounds Cleaning and Maintenance Workers	133	16	1.02	\$14.20
37-2000	Building Cleaning and Pest Control Workers	1,540	120	1.00	\$11.31
37-3000	Grounds Maintenance Workers	429	62	0.82	\$10.93
39-0000	Personal Care and Service Occupations	2,241	215	0.93	\$10.46
39-1000	Supervisors of Personal Care and Service Workers	85	1	0.90	\$14.64
39-2000	Animal Care and Service Workers	95	7	0.87	\$10.60
39-3000	Entertainment Attendants and Related Workers	95	(8)	0.42	\$9.28
39-4000	Funeral Service Workers	31	(3)	1.27	\$14.72
39-5000	Personal Appearance Workers	516	96	1.39	\$11.96
39-6000	Baggage Porters, Bellhops, and Concierges	12	1	0.41	\$9.75
39-7000	Tour and Travel Guides	15	2	0.74	\$11.73
39-9000	Other Personal Care and Service Workers	1,393	119	0.90	\$9.63
41-0000	Sales and Related Occupations	7,334	879	1.25	\$14.58
41-1000	Supervisors of Sales Workers	1,115	155	1.70	\$19.53
41-2000	Retail Sales Workers	5,165	664	1.57	\$11.65
41-3000	Sales Representatives, Services	358	40	0.44	\$24.44
41-4000	Sales Representatives, Wholesale and Manufacturing	330	(12)	0.49	\$28.11
41-9000	Other Sales and Related Workers	366	32	0.89	\$19.38
43-0000	Office and Administrative Support Occupations	9,491	1,593	1.08	\$15.17
43-1000	Supervisors of Office and Administrative Support Workers	695	131	1.26	\$22.74
43-2000	Communications Equipment Operators	36	10	0.94	\$11.47
43-3000	Financial Clerks	1,148	24	0.92	\$16.44
43-4000	Information and Record Clerks	3,162	1,134	1.45	\$13.53
43-5000	Material Recording, Scheduling, Dispatching, and Distributing Workers	1,693	174	1.10	\$15.17
43-6000	Secretaries and Administrative Assistants	1,541	94	1.00	\$14.61
43-9000	Other Office and Administrative Support Workers	1,216	26	0.74	\$14.73

SOC	Description	2017 Jobs	2012–2017 Change	2017 Location Quotient	Avg. Hourly Earnings
45-0000	Farming, Fishing, and Forestry Occupations	96	4	0.22	\$11.59
45-1000	Supervisors of Farming, Fishing, and Forestry Workers	<10		0.36	Insf. Data
45-2000	Agricultural Workers	66	(1)	0.17	\$10.12
45-3000	Fishing and Hunting Workers	<10		0.26	Insf. Data
45-4000	Forest, Conservation, and Logging Workers	21	3	0.81	\$13.25
47-0000	Construction and Extraction Occupations	2,143	(9)	0.82	\$16.59
47-1000	Supervisors of Construction and Extraction Workers	200	1	0.84	\$24.43
47-2000	Construction Trades Workers	1,675	(27)	0.82	\$15.46
47-3000	Helpers, Construction Trades	100	1	1.14	\$12.14
47-4000	Other Construction and Related Workers	113	17	0.70	\$21.01
47-5000	Extraction Workers	55	(1)	0.79	\$21.17
49-0000	Installation, Maintenance, and Repair Occupations	2,447	285	1.10	\$20.65
49-1000	Supervisors of Installation, Maintenance, and Repair Workers	164	21	0.95	\$27.26
49-2000	Electrical and Electronic Equipment Mechanics, Installers, and Repairers	230	28	0.97	\$25.02
49-3000	Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	614	58	0.93	\$19.56
49-9000	Other Installation, Maintenance, and Repair Occupations	1,440	178	1.24	\$19.67
51-0000	Production Occupations	4,393	(88)	1.27	\$17.83
51-1000	Supervisors of Production Workers	458	15	2.00	\$27.55
51-2000	Assemblers and Fabricators	1,090	15	1.63	\$16.20
51-3000	Food Processing Workers	214	40	0.70	\$11.79
51-4000	Metal Workers and Plastic Workers	926	(37)	1.29	\$19.92
51-5100	Printing Workers	176	21	1.81	\$17.07
51-6000	Textile, Apparel, and Furnishings Workers	256	5	1.05	\$12.73
51-7000	Woodworkers	38	1	0.37	\$14.85
51-8000	Plant and System Operators	138	21	1.22	\$25.43
51-9000	Other Production Occupations	1,097	(169)	1.12	\$15.21

SOC	Description	2017 Jobs	2012–2017 Change	2017 Location Quotient	Avg. Hourly Earnings
53-0000	Transportation and Material Moving Occupations	2,355	172	0.61	\$14.51
53-1000	Supervisors of Transportation and Material Moving Workers	93	19	0.61	\$23.06
53-2000	Air Transportation Workers	24	8	0.23	\$40.35
53-3000	Motor Vehicle Operators	1,419	121	0.87	\$14.12
53-4000	Rail Transportation Workers	22	7	0.41	\$26.60
53-5000	Water Transportation Workers	<10		0.19	Insf. Data
53-6000	Other Transportation Workers	85	26	0.62	\$11.97
53-7000	Material Moving Workers	706	(10)	0.40	\$13.11
55-0000	Military occupations	645	10	0.88	\$18.73
55-9000	Military occupations	645	10	0.88	\$18.73
	All Occupations	59,134	6,040		\$18.17

Source: ESMI, Garner Economics