

**Business Case  
Transportation, Distribution,  
and Logistics Cluster  
Sumner County, TN  
45 Minute Drive Time**



**1598 GreenLea Boulevard  
Gallatin, TN 37066**

**615-206-6624**

**[www.forwardsumner.org](http://www.forwardsumner.org)**

# Parameters

## Industries:

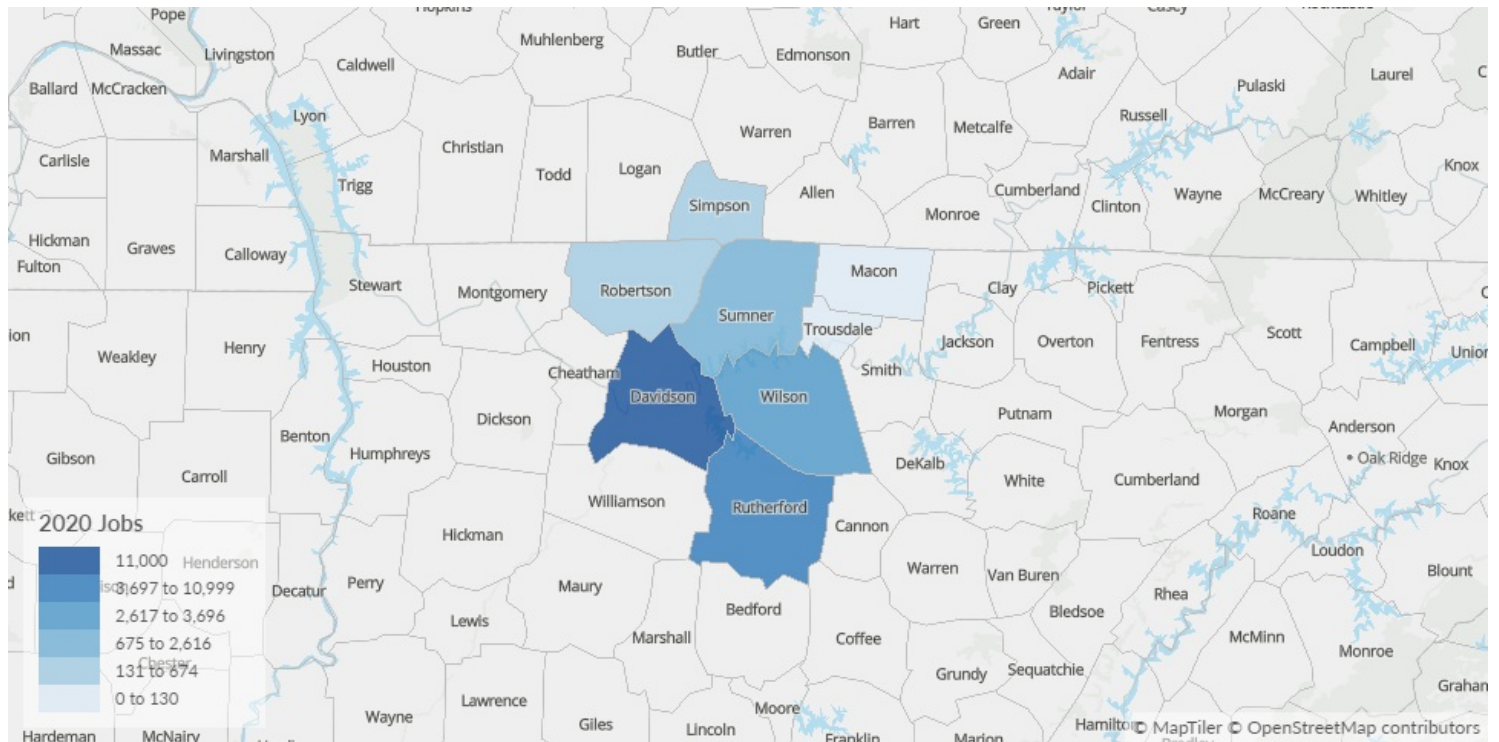
19 items selected. See Appendix A for details.

## Regions:

Code	Description	Code	Description
21213	Simpson County, KY	47149	Rutherford County, TN
47037	Davidson County, TN	47165	Sumner County, TN
47111	Macon County, TN	47169	Trousdale County, TN
47147	Robertson County, TN	47189	Wilson County, TN

Datarun: 2021.1 - QCEW Employees, Non-QCEW Employees, and Self-Employed

# Harvard Cluster: Transportation and Logistics for Sumner 45 DT vs. Nation

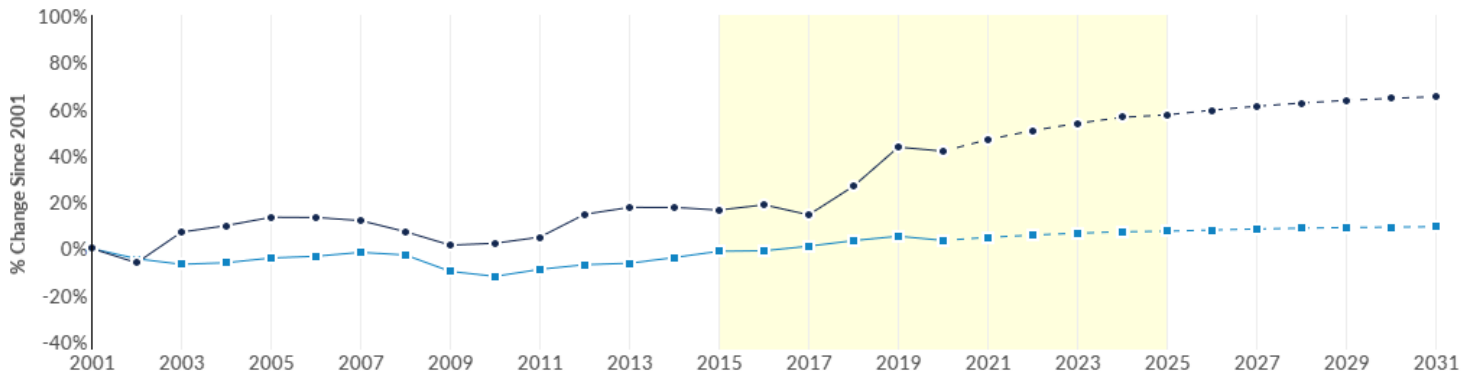


## Executive Summary

<p style="text-align: center;"><b>538</b></p> <p style="text-align: center;"><b>Payrolled Business Locations</b></p> <p>Payrolled business locations <b>increased by 79</b> over the last 5 years.</p>	<p style="text-align: center;"><b>18,426</b></p> <p style="text-align: center;"><b>Jobs</b></p> <p>Jobs <b>increased by 3,289</b> over the last 5 years. Projected to <b>increase by 2,028</b> over the next 5 years.</p>	<p style="text-align: center;"><b>1.59</b></p> <p style="text-align: center;"><b>Concentration</b></p> <p>Regional job concentration is <b>1.59 times</b> the national job concentration.</p>	<p style="text-align: center;"><b>\$62.5K</b></p> <p style="text-align: center;"><b>Earnings Per Job</b></p> <p>Regional earnings per job are <b>\$21.1K below</b> the national earnings per job of \$83.6K.</p>
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- Jobs for your selected industries increased by 3,289 jobs (21.7%) from 2015-2020, outpacing the national growth rate of 4.7%. The industries are projected to increase by 2,028 jobs (11.0%) from 2020-2025, outpacing the national growth rate of 3.8%.
- Regional job concentration for your selected industries is 1.59 times the national job concentration. In other words, there are 59% more jobs at your selected industries in this region than we would expect to find in the average region.
- Cost of labor in the region is below average. The regional earnings per job for your selected industries is \$62.5K, which is \$21.1K below the national average of \$83.6K.

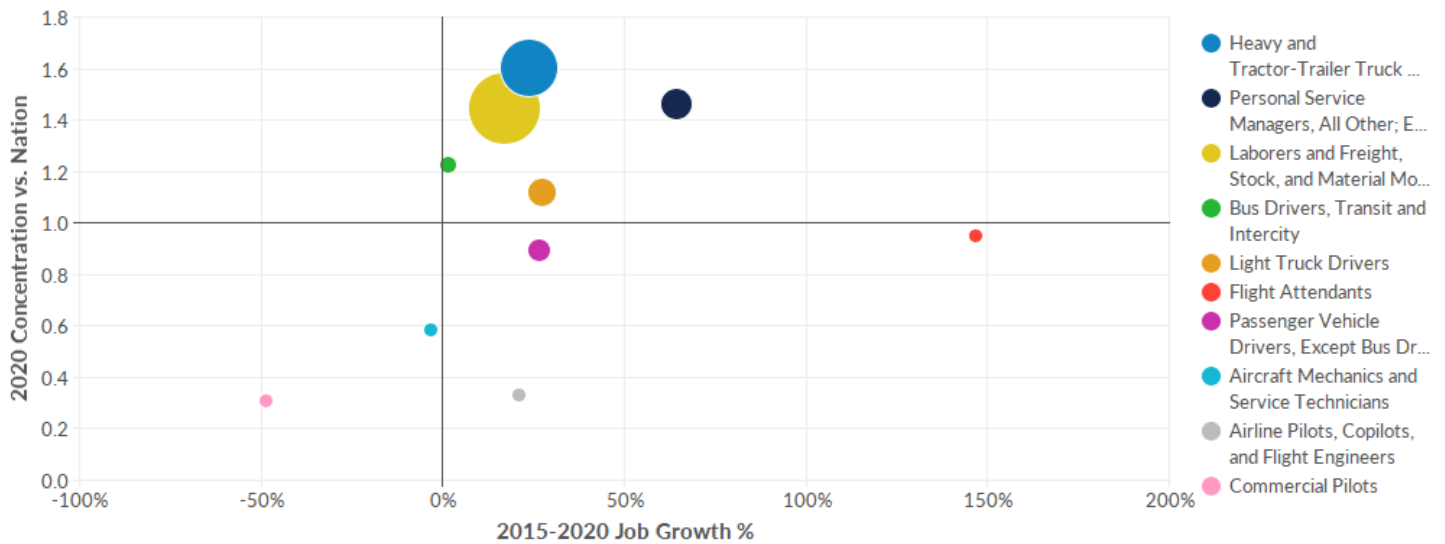
# Regional Trends



Region	2015 Jobs	2020 Jobs	2025 Jobs	Change	2015-2020 Growth %	2020-2025 Growth %
● Sumner 45 DT	15,137	18,426	20,453	5,316	21.7%	11.0%
■ Nation	2,075,963	2,174,016	2,256,711	180,748	4.7%	3.8%

# Workforce Availability

Key occupations for your selected industries have an overall concentration of **1.09**, indicating above average workforce availability. These occupations experienced overall job growth of **24.7%** from 2015-2020, indicating that the regional talent pool is increasing.



SOC	Key Occupation	Concentration	2015 Jobs	2020 Jobs	2025 Jobs	Median Hourly Earnings	Average Hourly Earnings
53-3032	Heavy and Tractor-Trailer Truck Drivers	1.61	14,749	18,240	20,457	\$22.23/hr	\$23.47/hr
11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	1.46	4,521	7,421	7,888	\$32.11/hr	\$38.13/hr
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	1.45	19,945	23,335	25,772	\$14.18/hr	\$14.67/hr
53-3052	Bus Drivers, Transit and Intercity	1.23	1,194	1,209	1,280	\$18.43/hr	\$20.41/hr
53-3033	Light Truck Drivers	1.12	4,702	5,982	6,690	\$16.02/hr	\$17.46/hr
53-2031	Flight Attendants	0.95	253	623	752	\$25.58/hr	\$31.19/hr
53-3058	Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	0.89	3,422	4,334	4,936	\$15.02/hr	\$17.28/hr
49-3011	Aircraft Mechanics and Service Technicians	0.59	638	618	635	\$26.42/hr	\$28.34/hr
53-2011	Airline Pilots, Copilots, and Flight Engineers	0.33	194	234	273	\$43.42/hr	\$45.73/hr
	Total	1.09	49,798	62,089	68,783		\$21.09/hr

53-2012	Commercial Pilots	0.31	180	93	100	\$47.76/hr	\$49.93/hr
	Total	1.09	49,798	62,089	68,783		\$21.09/hr

## Supply Chain Requirements

66%

### Satisfied In-Region

66% of the goods and services that your selected industries require to operate are provided within the region.

NAICS	Industry	Total Requirements	% Satisfied In-Region
324110	Petroleum Refineries	\$119,450,372	0.0%
488510	Freight Transportation Arrangement*	\$102,042,509	93.5%
492110	Couriers and Express Delivery Services	\$81,510,506	75.8%
551114	Corporate, Subsidiary, and Regional Managing Offices	\$60,139,677	72.7%
561320	Temporary Help Services	\$54,568,296	99.3%
493110	General Warehousing and Storage	\$51,454,664	86.5%
488190	Other Support Activities for Air Transportation*	\$48,715,364	84.7%
522110	Commercial Banking	\$42,398,252	93.6%
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	\$40,731,646	89.3%
447110	Gasoline Stations with Convenience Stores	\$35,405,796	77.1%

\*Businesses in your selected industries purchase goods and/or services from other businesses in the industries.

# Appendix A - Industries

Code	Description
481111	Scheduled Passenger Air Transportation
481112	Scheduled Freight Air Transportation
481211	Nonscheduled Chartered Passenger Air Transportation
481212	Nonscheduled Chartered Freight Air Transportation
481219	Other Nonscheduled Air Transportation
482110	Rail transportation
484121	General Freight Trucking, Long-Distance, Truckload
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance
485210	Interurban and Rural Bus Transportation
485510	Charter Bus Industry

Code	Description
488111	Air Traffic Control
488119	Other Airport Operations
488190	Other Support Activities for Air Transportation
488210	Support Activities for Rail Transportation
488490	Other Support Activities for Road Transportation
488510	Freight Transportation Arrangement
488991	Packing and Crating
488999	All Other Support Activities for Transportation
491110	Postal Service

# Appendix B - Data Sources and Calculations

## Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

## Occupation Data

Emsi occupation employment data are based on final Emsi industry data and final Emsi staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors). Occupational wage estimates also affected by county-level Emsi earnings by industry.

## Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

## Input-Output Data

The input-output model in this report is Emsi's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several Emsi in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

## State Data Sources

This report uses state data from the following agencies: Arizona Department of Administration, Office of Employment and Population Statistics; Arkansas Department of Workforce Services; California Labor Market Information Department; Colorado Department of Labor and Employment; Connecticut did not provide us with a data source; Delaware Office of Occupational and Labor Market Information, Delaware Wages 2004; District of Columbia Department of Employment Services; Florida Department of Economic Opportunity; Georgia Department of Labor, Workforce Information and Analysis, Occupational Information Services Unit; Hawaii Department of Labor and Industrial Relations, Research and Statistics Office; Idaho Department of Labor; Illinois Department of Employment Security, Employment Projections; Indiana Department of Workforce Development; Iowa Workforce Development; Kansas Department of Labor, Labor Market Information Services, Kansas Wage Survey; Kentucky Office of Employment and Training; Louisiana Department of Labor; Maine did not provide us with a data source; Maryland Department of Labor, Licensing and Regulation, Office of Labor Market Analysis and Information; Massachusetts Executive Office of Labor and Workforce Development; Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives; Minnesota Department of Employment and Economic Development; Mississippi Department of Employment Security; Missouri Department of Economic Development; Montana Department of Labor and Industry, Research and Analysis Bureau; Nebraska Workforce Development; Nevada Department of Employment, Training and Rehabilitation, Information Development and Processing Division, Research and Analysis Bureau; New Hampshire Department of Employment Security; New Jersey Department of Labor and Workforce Development; New Mexico Department of Labor, Bureau of Economic Research and Analysis; New York Department of Labor, Division of Research and Statistics; North Carolina Department of Commerce, Labor and Economic Analysis Division; North Dakota Job Service, Labor Market Information Center; Ohio Department of Job and Family Services, Labor Market



Information Division; Oklahoma Employment Security Commission; Oregon Employment Department, Oregon Labor Market Information System; Pennsylvania Department of Labor and Industry, Center for Workforce Information and Analysis; Rhode Island did not provide us with a data source; South Carolina Employment Security Commission, Labor Market Information Department; South Dakota Department of Labor, Labor Market Information Division; Tennessee Department of Labor and Workforce Development, Research and Statistics Division; Texas Workforce Commission; Utah Department of Workforce Services; Vermont did not provide us with a data source; Virginia Employment Commission, Economic Information Services; Washington State Employment Security Department, Labor Market and Economic Analysis Branch; West Virginia Bureau of Employment Programs, Research Information & Analysis Division; Wisconsin Department of Workforce Development, Bureau of Workforce Information; Wyoming Department of Employment, Research and Planning