T.L.L. Temple Foundation's

DEEP EAST TEXAS ECONOMIC AND LABOR MARKET UPDATE

MAY 2024

SUMMARY OF FINDINGS

Economy. The Deep East Texas region, which includes Angelina, Nacogdoches, Shelby, San Augustine, and Sabine counties, has an employment base of approximately 80,000 jobs and is expected to have more than 50,000 job openings between 2024 and 2029. The industry sectors that employ the largest number of workers are health care, education, and retail trade. Over the next five years, health care, finance, and manufacturing are expected to be driving job growth. The high-demand, high-wage occupations with the greatest number of openings include a range of jobs in health care, education, business and operations, and transportation.

Labor shed. The Deep East Texas region pulls labor in from a wide area that extends into Louisiana. Within a 45-minute drive is a labor force of over 200,000. Almost half of the population 25 years and older in the labor shed area has attained at least some degree of postsecondary education.

Resident linkages. The region has very strong connections with the Houston metropolitan area, which is both the largest source of residents moving to the Deep East Texas region and the largest destination for residents moving away from the region. Dallas, Austin, Beaumont, and Longview are also major sources and destinations for residents moving into and out of the region.

Employment situation. After weathering the pandemic-related downturn well, the region has recovered back to its 2019 level of employment. Manufacturing, finance and insurance, and retail were the industries that led regional job growth between 2019 and 2023. Education, administrative and support services, and government were the industries that lost jobs during this same period.

Labor market performance. The regional labor force was stable during the pandemic-related downturn and has grown one percent since 2019. The unemployment rate has declined considerably since its 2020 peak, reaching 4.6 percent in 2023.

High-demand, high-wage occupations. Very few of the top 25 highest-demand occupations require postsecondary training or earn a living wage-only general and operations managers, truck drivers, and registered nurses meet both criteria. Beyond the top 25, however, there are a variety of high-demand occupations that earn more than the regional living wage of $19.63. The occupational clusters that have the largest number of occupations that are high-demand and earn living wages are education, construction, and health care.
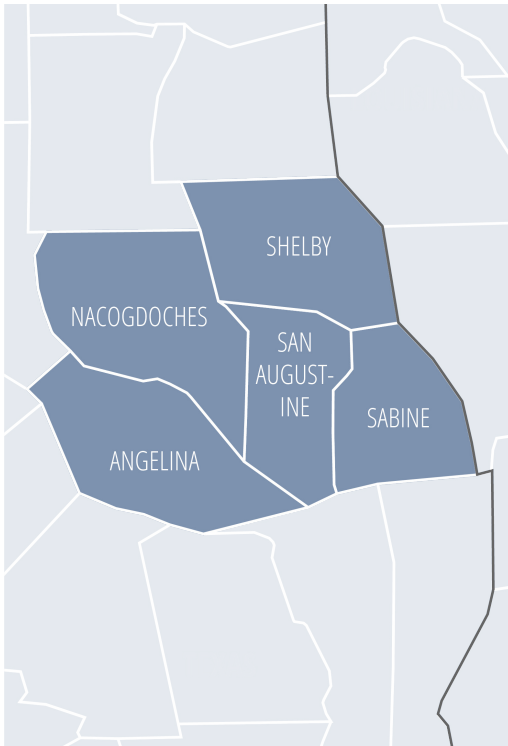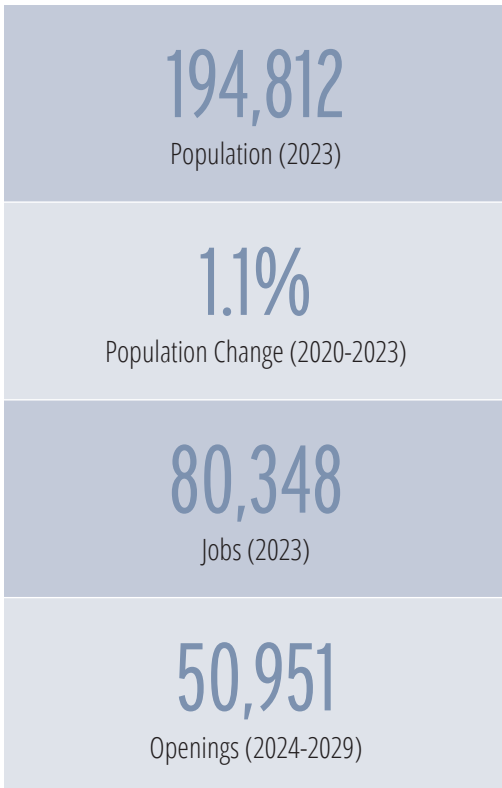
SUMMARY STATISTICS

FIGURE 1. COUNTIES

SHELBY

NACOGDOCHES

SAN AUGUST-INE

SABINE

ANGELINA

FIGURE 2. EMPLOYMENT BY INDUSTRY + NEXT 5-YEAR CHANGE

Health Care & Social Assistance (including Public)
Educational Services (including Public)
Retail Trade
Manufacturing
Accommodation & Food Services
Government
Construction
Other Services (except Public Administration)
Admin. & Support & Waste Mgmt. & Remediation
Finance & Insurance
Wholesale Trade
Agriculture, Forestry, Fishing & Hunting
Professional, Scientific, & Technical Services
Transportation & Warehousing
Mining, Quarrying, & Oil & Gas Extraction

■ 2023 Jobs
■ 2024-2029

-1,000 1,000 3,000 5,000 7,000 9,000 11,000 13,000

FIGURE 3. KEY STATISTICS

194,812
Population (2023)

1.1%
Population Change (2020-2023)

80,348
Jobs (2023)

50,951
Openings (2024-2029)

FIGURE 4. TOP HIGH-DEMAND, HIGH-WAGE JOBS*

OCCUPATION	OPENINGS (2024-2029)
1. General & Operations Managers	994
2. Heavy & Tractor-Trailer Truck Drivers	919
3. Registered Nurses	544
4. Elementary School Teachers, Except Special Education	360
5. Licensed Practical & Licensed Vocational Nurses	310
6. Secondary School Teachers, Except Special & Career/Technical Education	278
7. Accountants & Auditors	206
8. Middle School Teachers, Except Special & Career/Technical Education	183
9. Managers, All Other	172
10. Medical & Health Services Managers	148
11. Financial Managers	144
12. Human Resources Specialists	130
13. Loan Officers	122
14. Construction Managers	120
15. Business Operations Specialists, All Other	117

* Includes only occupations that pay at least a living wage of $19.63 and require postsecondary education.
Sources: US Census Bureau, and Lightcast 2024.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

LABORSHED STATISTICS
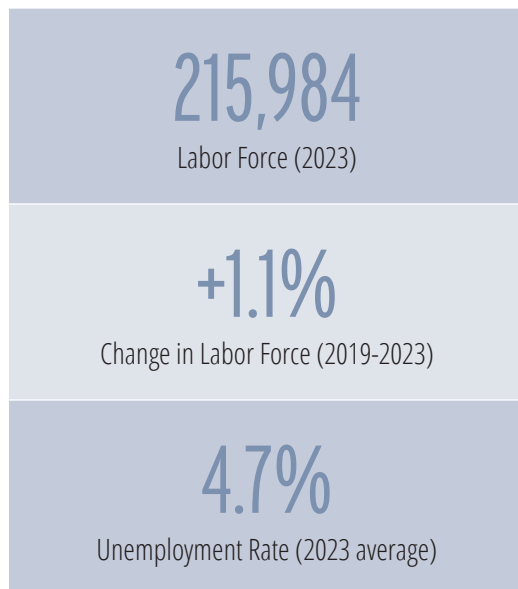
FIGURE 5. KEY LABORSHED STATISTICS

215,984
Labor Force (2023)

+1.1%
Change in Labor Force (2019-2023)

4.7%
Unemployment Rate (2023 average)

FIGURE 7. EDUCATIONAL ATTAINMENT OF LABORSHED

- HS or Less
- Some College
- Bachelor's or Higher

16.3%
52.7%
31.0%

FIGURE 6. LABORSHED DEFINITION (45-MINUTE LABORSHED)

- Laborshed
- Deep East Texas Region

Rusk County, TX
Panola County, TX
De Soto Parish, LA
Cherokee County, TX
Shelby County, TX
Nacogdoches County, TX
Sabine Parish, LA
San Augustin County, TX
Houston County, TX
Angelina County, TX
Sabine County, TX
Trinity County, TX
Newton County, TX
Jasper County, TX
Polk County, TX
Tyler County, TX

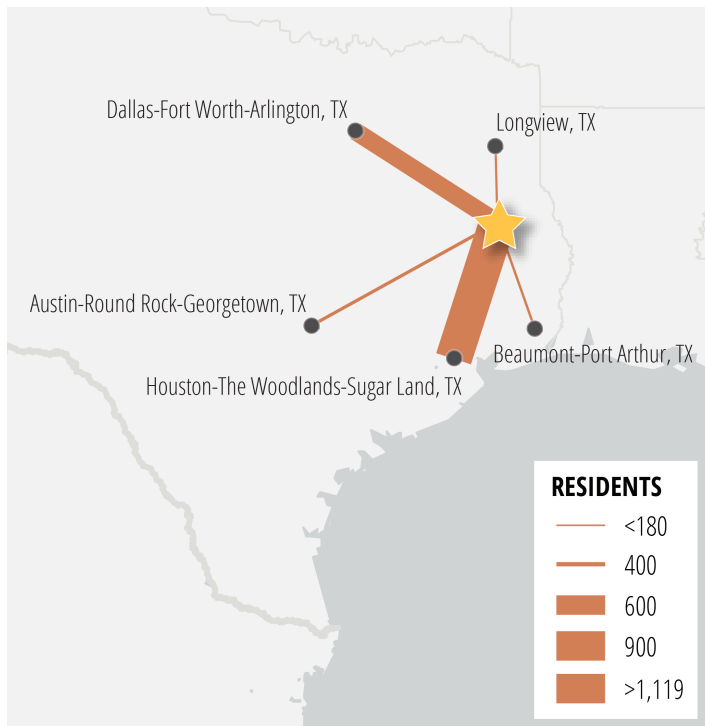Powered by Bing
© GeoNames, TomTom

Source: US Bureau of Labor Statistics, US Census Bureau; 2022 ACS 5-year Estimates; and ARC Research.

RESIDENT INFLOWS/OUTFLOWS

FIGURE 8. MAP OF TOP SOURCES AND DESTINATIONS FOR RESIDENTS MOVING TO/FROM DEEP EAST TEXAS, 2021
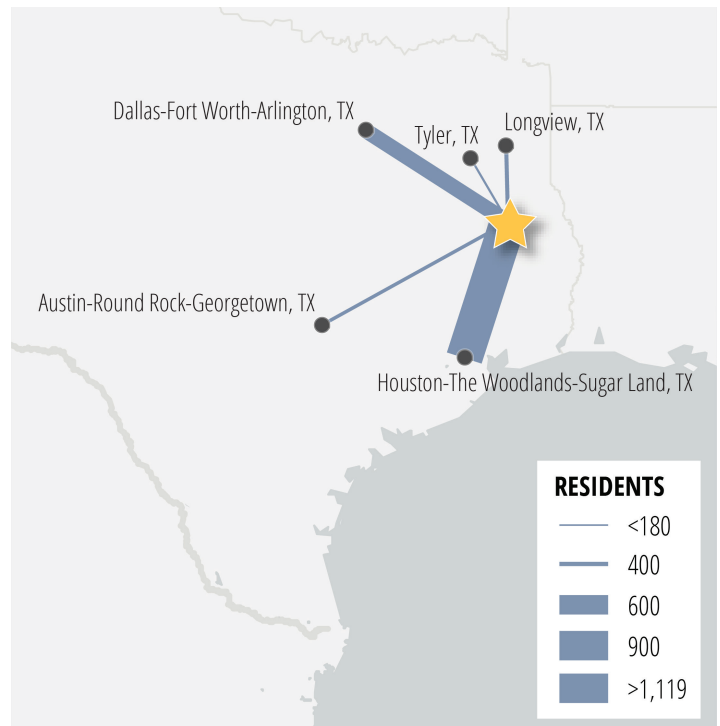
Top Sources

Top Destinations

FIGURE 9. TOP SOURCES AND DESTINATIONS FOR RESIDENTS MOVING TO/FROM DEEP EAST TEXAS, 2021

METROPOLITAN AREA	INBOUND	OUTBOUND	NET FLOW
Total Inflows/Outflows	**5,815**	**5,004**	**812**
TOP FIVE SOURCES OF RESIDENTS FROM DEEP EAST TEXAS			
1. Houston-The Woodlands-Sugar Land, TX	1,072	1,119	-46
2. Dallas-Fort Worth-Arlington, TX	599	541	58
3. Austin-Round Rock-Georgetown, TX	238	223	15
4. Beaumont-Port Arthur, TX	217	125	93
5. Longview, TX	204	235	-31
TOP FIVE DESTINATIONS FOR RESIDENTS TO DEEP EAST TEXAS			
1. Houston-The Woodlands-Sugar Land, TX	1,072	1,119	-46
2. Dallas-Fort Worth-Arlington, TX	599	541	58
3. Longview, TX	204	235	-31
4. Austin-Round Rock-Georgetown, TX	238	223	15
5. Tyler, TX	127	180	-53

Sources: IRS Migration Data via Lightcast.

EMPLOYMENT SITUATION

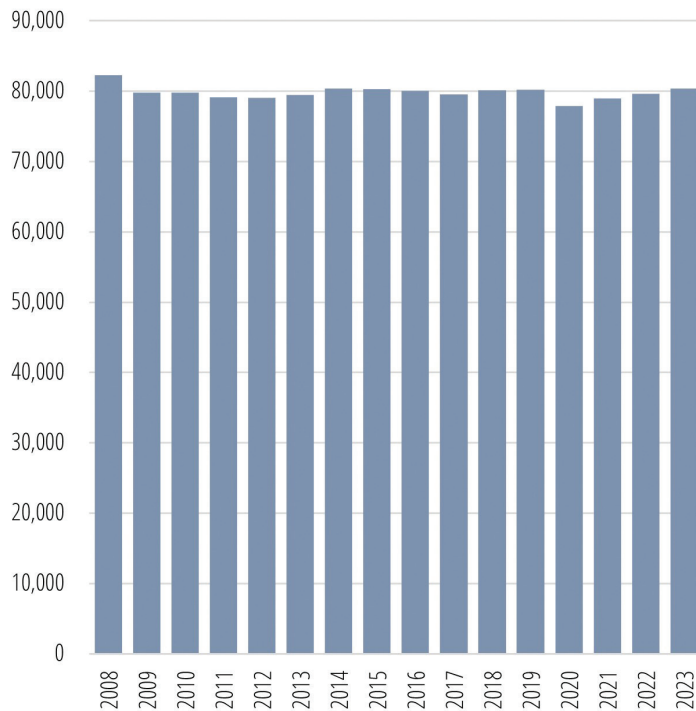## FIGURE 10. TOTAL EMPLOYMENT (2008-2023)

FIGURE 11. COMPARATIVE EMPLOYMENT GROWTH (2008-2023)
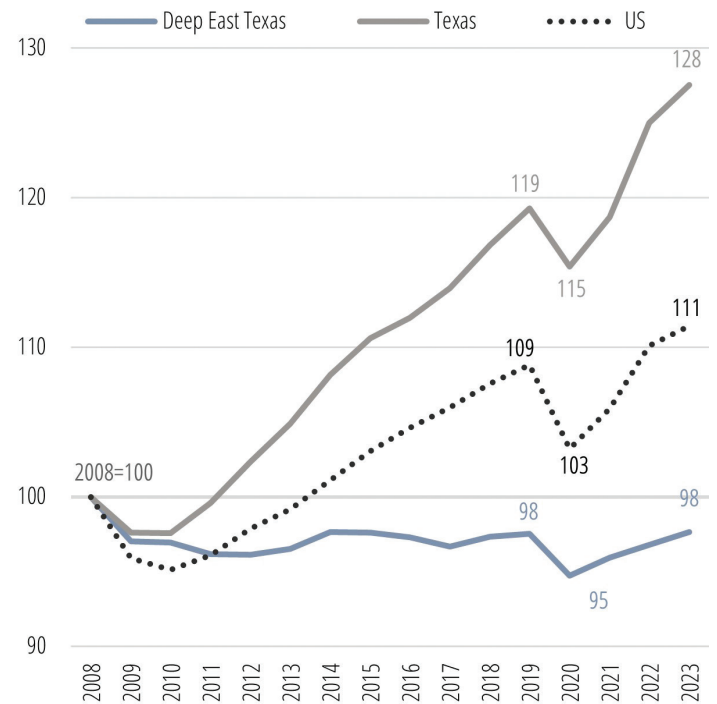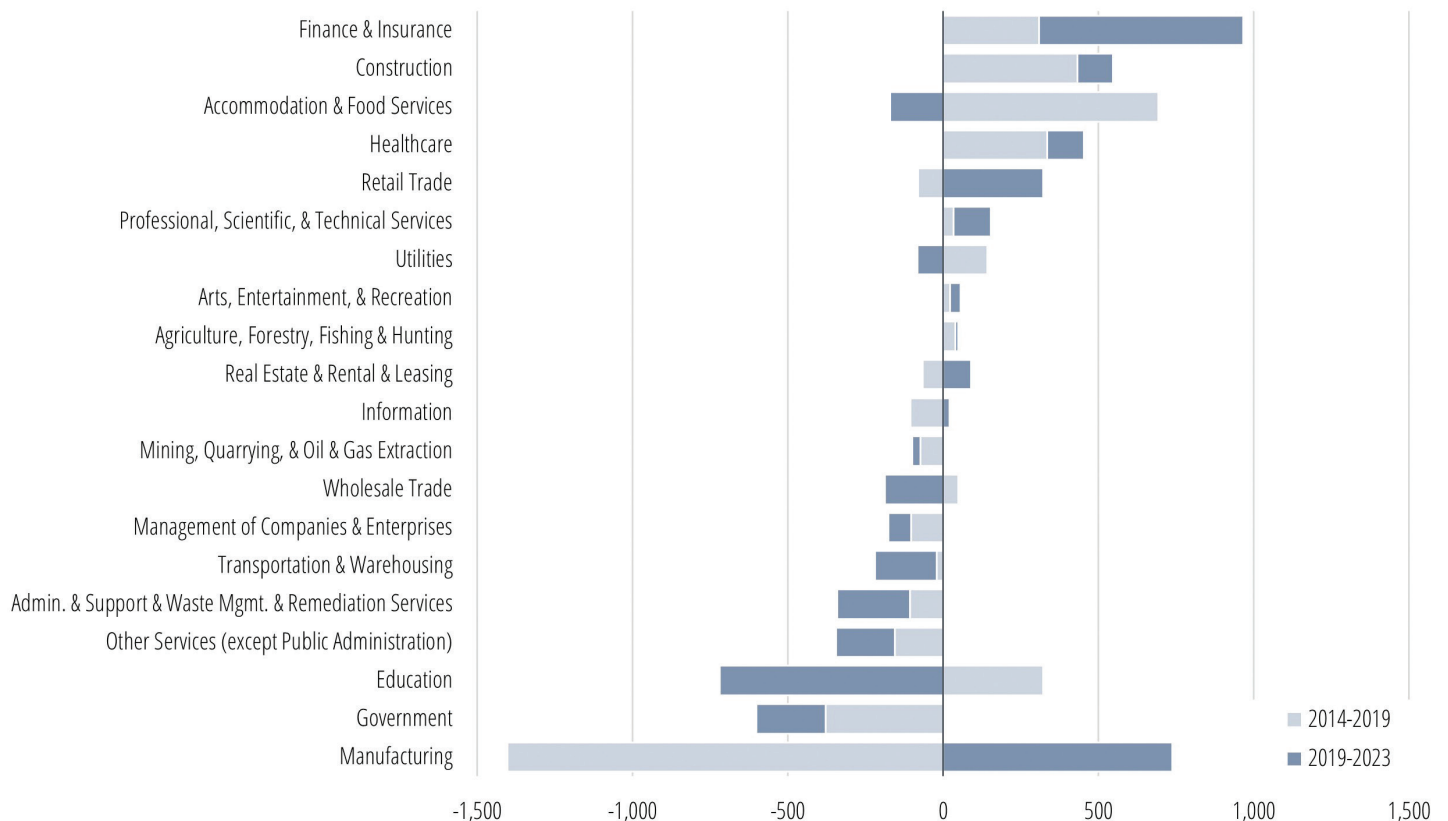

FIGURE 12. EMPLOYMENT CHANGE BY INDUSTRY, 2014-2019, 2019-2023

Sources: Lightcast 2024.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

LABOR MARKET PERFORMANCE

FIGURE 13. CIVILIAN LABOR FORCE, 2008-2023
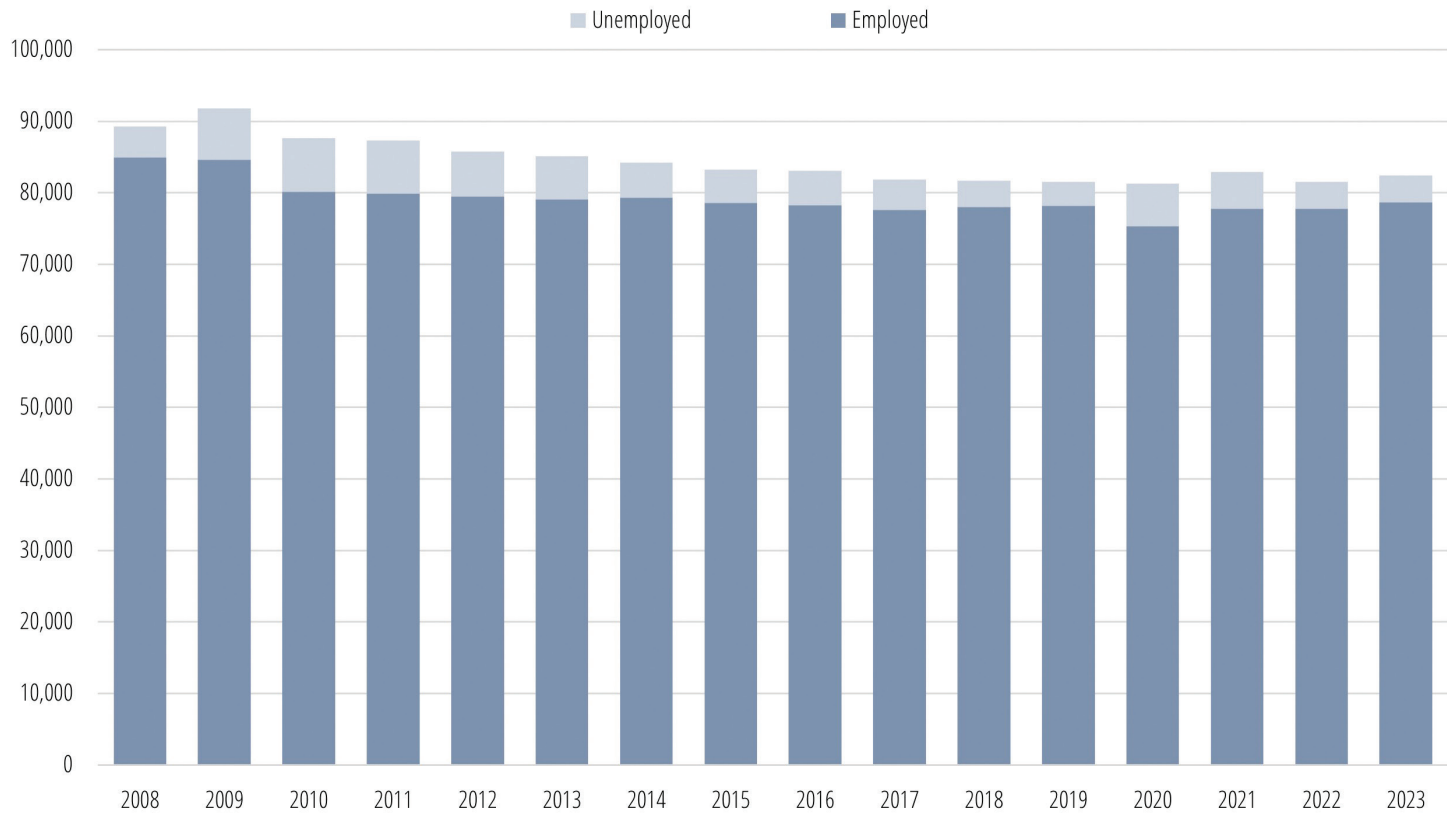

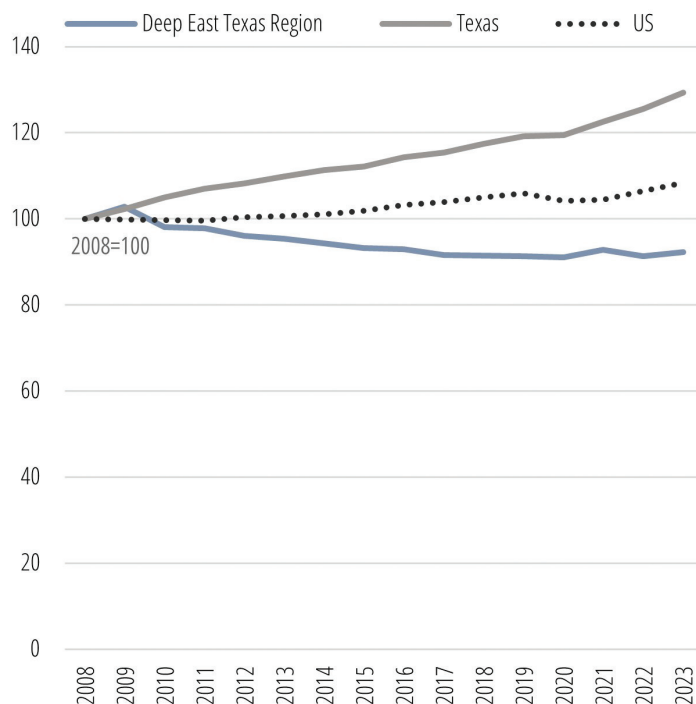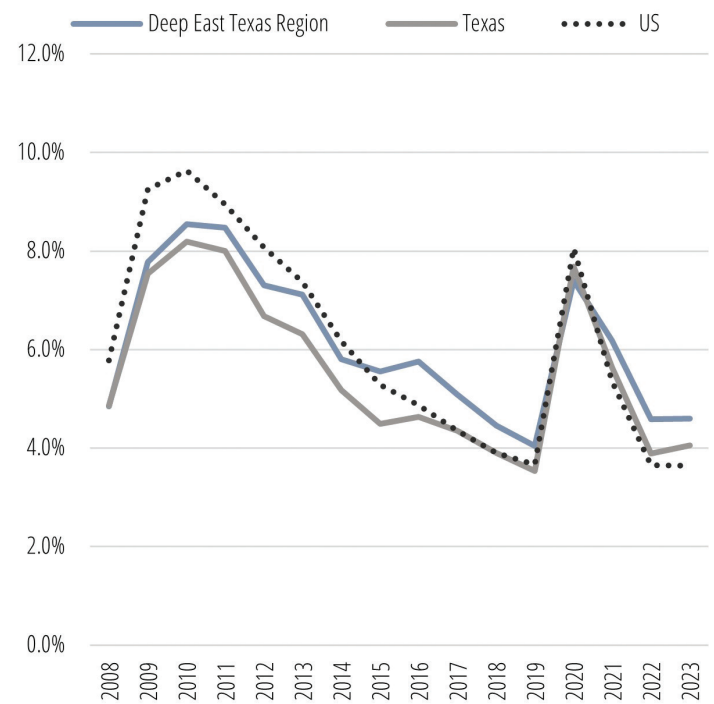FIGURE 14. COMPARATIVE LABOR FORCE GROWTH (2008-2023)

FIGURE 15. COMPARATIVE UNEMPLOYMENT RATES (2008-2020)

Source: US Bureau of Labor Statistics.

HIGH DEMAND OCCUPATIONS

FIGURE 16. TOP OCCUPATION BY OPENINGS (2024-2029)

Occupations that pay more than the regional living wage of $19.63 are highlighted as follows:

■ **LOW-SKILL**
Requires a high school diploma or less

■ **MIDDLE-SKILL**
Requires more than a diploma, less than a bachelor's

■ **HIGH-SKILL**
Requires a bachelor's degree or higher

SOC	DESCRIPTION	2023 JOBS	OPENINGS (2024-2029)	REGIONAL MEDIAN HOURLY EARNINGS	COMPARISON TO TEXAS MEDIAN HOURLY EARNINGS
35-3023	Fast Food & Counter Workers	2,150	2,637	$10.48	-3.9%
41-2011	Cashiers	2,146	2,137	$10.71	-13.5%
31-1128	Home Health & Personal Care Aides	2,693	2,069	$10.28	-2.4%
41-2031	Retail Salespersons	1,873	1,489	$13.56	-0.6%
53-7065	Stockers & Order Fillers	1,451	1,226	$14.60	-11.6%
35-3031	Waiters & Waitresses	1,016	1,028	$9.90	-4.7%
53-7062	Laborers & Freight, Stock, & Material Movers, Hand	1,509	1,026	$15.94	-3.4%
37-2011	Janitors & Cleaners, Except Maids & Housekeeping Cleaners	1,345	1,020	$12.66	-6.2%
43-4051	Customer Service Representatives	1,431	1,011	$13.98	-20.7%
11-1021	General & Operations Managers	2,124	994	$34.89	-12.6%
53-3032	Heavy & Tractor-Trailer Truck Drivers	1,583	919	$22.02	-2.3%
43-9061	Office Clerks, General	1,259	769	$15.21	-8.6%
35-2021	Food Preparation Workers	785	690	$11.22	-14.6%
31-1131	Nursing Assistants	845	684	$13.76	-7.3%
43-6014	Secretaries & Admin. Assistants, Except Legal, Medical, & Executive	1,104	608	$16.63	-10.2%
35-1012	First-Line Supervisors of Food Preparation & Serving Workers	685	551	$15.10	-7.3%
25-9045	Teaching Assistants, Except Postsecondary	903	548	$14.03	+3.9%
43-4171	Receptionists & Information Clerks	771	544	$13.96	-4.3%
29-1141	Registered Nurses	1,429	544	$36.87	-3.9%
41-1011	First-Line Supervisors of Retail Sales Workers	993	525	$17.31	-9.3%
35-2014	Cooks, Restaurant	591	510	$13.75	-4.2%
43-3031	Bookkeeping, Accounting, & Auditing Clerks	820	497	$18.40	-13.8%
49-9071	Maintenance & Repair Workers, General	962	482	$17.64	-2.6%
37-2012	Maids & Housekeeping Cleaners	602	466	$11.09	-13.7%
39-9011	Childcare Workers	569	464	$9.99	-10.1%

Source: Lightcast 2024.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

HIGH DEMAND OCCUPATIONS (CONTINUED)

FIGURE 16. TOP OCCUPATION BY OPENINGS (2024-2029) (CONTINUED)

Occupations that pay more than the regional living wage of $19.63 are highlighted as follows:

■ **LOW-SKILL**
Requires a high school diploma or less

■ **MIDDLE-SKILL**
Requires more than a diploma, less than a bachelor's

■ **HIGH-SKILL**
Requires a bachelor's degree or higher

SOC	DESCRIPTION	2023 JOBS	OPENINGS (2024-2029)	REGIONAL MEDIAN HOURLY EARNINGS	COMPARISON TO TEXAS MEDIAN HOURLY EARNINGS
47-2061	Construction Laborers	912	451	$14.93	-13.0%
43-1011	First-Line Supervisors of Office & Administrative Support Workers	832	429	$24.36	-14.8%
37-3011	Landscaping & Groundskeeping Workers	621	421	$13.14	-15.5%
45-2092	Farmworkers & Laborers, Crop, Nursery, & Greenhouse	463	376	$12.28	-5.3%
51-3022	Meat, Poultry, & Fish Cutters & Trimmers	605	366	$16.35	-2.5%
25-2021	Elementary School Teachers, Except Special Education	990	360	$24.69	-16.3%
43-6013	Medical Secretaries & Administrative Assistants	608	358	$13.80	-22.3%
31-9092	Medical Assistants	462	356	$16.51	-6.7%
51-2098	Miscellaneous Assemblers & Fabricators	609	348	$17.27	+1.9%
25-1099	Postsecondary Teachers	737	324	$26.37	-35.1%
29-2061	Licensed Practical & Licensed Vocational Nurses	747	310	$23.47	-4.1%
49-3023	Automotive Service Technicians & Mechanics	616	306	$19.18	-6.4%
53-7061	Cleaners of Vehicles & Equipment	318	301	$12.72	-4.5%
35-2012	Cooks, Institution & Cafeteria	373	289	$11.98	-13.3%
43-3071	Tellers	397	282	$14.92	-10.5%
25-2031	Secondary School Teachers, Except Special & Career/Tech. Education	813	278	$27.65	-6.6%
53-7064	Packers & Packagers, Hand	376	274	$15.64	+16.6%
33-3012	Correctional Officers & Jailers	627	266	$19.36	-7.5%
51-9198	Helpers--Production Workers	331	264	$16.20	+2.8%
25-3031	Substitute Teachers, Short-Term	409	260	$10.43	-22.8%
45-4022	Logging Equipment Operators	307	247	$21.88	-0.1%
51-1011	First-Line Supervisors of Production & Operating Workers	460	245	$28.36	-5.4%
11-9013	Farmers, Ranchers, & Other Agricultural Managers	475	232	$16.84	+0.2%
53-7051	Industrial Truck & Tractor Operators	429	229	$16.62	-10.2%
51-4121	Welders, Cutters, Solderers, & Brazers	383	227	$18.92	-17.8%

Source: Lightcast 2024.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

HIGH DEMAND OCCUPATIONS (CONTINUED)

FIGURE 16. TOP OCCUPATION BY OPENINGS (2024-2029) (CONTINUED)

Occupations that pay more than the regional living wage of $19.63 are highlighted as follows:

■ LOW-SKILL
Requires a high school diploma or less

■ MIDDLE-SKILL
Requires more than a diploma, less than a bachelor's

■ HIGH-SKILL
Requires a bachelor's degree or higher

SOC	DESCRIPTION	2023 JOBS	OPENINGS (2024-2029)	REGIONAL MEDIAN HOURLY EARNINGS	COMPARISON TO TEXAS MEDIAN HOURLY EARNINGS
53-3033	Light Truck Drivers	399	225	$16.76	-12.1%
41-4012	Sales Reps. of Svcs., Except Advertising, Insurance, Financial Svcs., & Travel	417	213	$24.40	-15.8%
13-2011	Accountants & Auditors	425	206	$31.62	-15.7%
25-2011	Preschool Teachers, Except Special Education	349	202	$18.98	+16.9%
47-1011	First-Line Supervisors of Construction Trades & Extraction Workers	397	197	$27.65	-9.0%
51-2028	Electrical, Electronic, & Electromechanical Assemblers, Except Coil Winders, Tapers, & Finishers	261	191	$15.71	-10.2%
53-3051	Bus Drivers, School	239	185	$18.50	-3.2%
35-9031	Hosts & Hostesses, Restaurant, Lounge, & Coffee Shop	149	185	$11.10	-1.1%
25-2022	Middle School Teachers, Except Special & Career/Technical Education	506	183	$24.36	-17.4%
43-5071	Shipping, Receiving, & Inventory Clerks	358	183	$14.87	-14.9%
35-3011	Bartenders	198	180	$10.84	-11.5%
39-5012	Hairdressers, Hairstylists, & Cosmetologists	264	180	$13.66	-2.7%
49-1011	First-Line Supervisors of Mechanics, Installers, & Repairers	367	175	$29.63	-7.3%
11-9199	Managers, All Other	371	172	$28.52	-37.5%
33-3051	Police & Sheriff's Patrol Officers	419	171	$25.03	-19.1%
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	266	171	$19.91	+3.2%
31-9091	Dental Assistants	222	169	$17.19	-4.9%
35-2011	Cooks, Fast Food	208	164	$11.33	+3.5%
53-1047	First-Line Supervisors of Transportation & Material Moving Workers, Except Aircraft Cargo Handling Supervisors	284	163	$25.38	-5.0%
47-2031	Carpenters	349	160	$18.59	-12.6%
47-2111	Electricians	303	160	$22.86	-12.4%
39-3091	Amusement & Recreation Attendants	97	155	$7.85	-28.7%
47-2073	Operating Engineers & Other Construction Equipment Operators	294	154	$20.79	-6.7%
33-9032	Security Guards	232	152	$12.29	-12.9%
41-3021	Insurance Sales Agents	288	150	$22.98	+7.4%

Source: Lightcast 2024.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed.
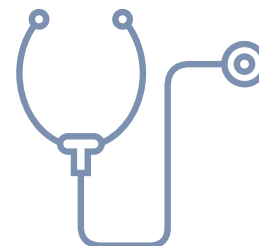
HIGH DEMAND CAREER CLUSTERS

FIGURE 17. HIGH DEMAND CAREER CLUSTERS

	EDUCATION & TRAINING	ARCHITECTURE & CONSTRUCTION	HEALTH SCIENCE
Occupations	• Elementary School Teacher • Postsecondary School Teacher • Secondary School Teacher	• First-Line Supervisor • Electrician • Operating Engineers & Other Construction Equipment Operator	• Registered Nurse • Licensed Practical & Vocational Nurse
Education Typically Required for Entry	• Bachelor's Degree or Higher & Certification from an Approved Educator Preparation Program	• Nondegree Award or HS Diploma & On-the-Job Training	• Associate Degree or Higher
Relevant Programs of Study	• Teaching and Training	• Electrical • Maintenance/Operations	• Nursing Science
Most-Requested Credential*	• Teaching Certificate	• Commercial Driver's License • Journeyman Electrician	• Basic Life Support Certification • Advanced Cardiovascular Life Support Certification • American Red Cross Certification
Top Employers Posting	1. Stephen F. Austin University 2. Center ISD 3. Cushing ISD 4. Central Heights ISD 5. Diboll ISD	1. West Fraser Timber 2. Evans Construction 3. CRH Americas 4. City of Nacogdoches 5. Tata Steel	1. Woodland Heights Medical Center 2. CommonSpirit Health 3. Catholic Health Initiatives 4. Aveanna Healthcare 5. Nacogdoches Medical Center

*Most-requested certificate or credential is based on job postings in 2023.
Source: Texas Education Agency, Lightcast Job Posting Analytics.

PUBLIC SCHOOL ENROLLMENT AND EMPLOYMENT OUTCOMES

FIGURE 18. ENROLLMENT AND EMPLOYMENT OUTCOMES, REGIONAL HIGH SCHOOL GRADUATES, 2019–2020

SCHOOL DISTRICT	TOTAL	ENROLLED IN COLLEGE ONLY	EMPLOYED ONLY	EMPLOYED & ENROLLED	ALL ENROLLED IN COLLEGE	ALL EMPLOYED	NOT LOCATED*
Lufkin	491	85	162	115	200	277	129
Nacogdoches	384	57	137	62	119	199	128
Hudson	204	45	59	43	88	102	57
Center	178	40	48	40	80	88	50
Diboll	137	24	40	37	61	77	36
Huntington	124	22	46	29	51	75	27
Central	106	15	32	23	38	55	36
Central Heights	73	18	18	16	34	34	21
Hemphill	61	5	23	12	17	35	21
Pineywoods Community Academy	57	12	23	12	24	35	10
San Augustine	57	15	20	6	21	26	16
Woden	57	15	15	18	33	33	9
Garrison	54	14	13	13	27	26	14
Timpson	49	10	18	14	24	32	7
Cushing	48	11	8	9	20	17	20
Tenaha	46	11	11	11	22	22	13
Joaquin	43	11	17		15	21	11
Shelbyville	40	11	8	12	23	20	9
West Sabine	37	9	17	0	9	20	11
Douglass	26	6	6	10	16	16	4
Zavalla	26	6	8	4	10	12	8

FIGURE 19. TOP TEXAS PUBLIC COLLEGES AND UNIVERSITIES
By Fall College Enrollment of District High School Graduates

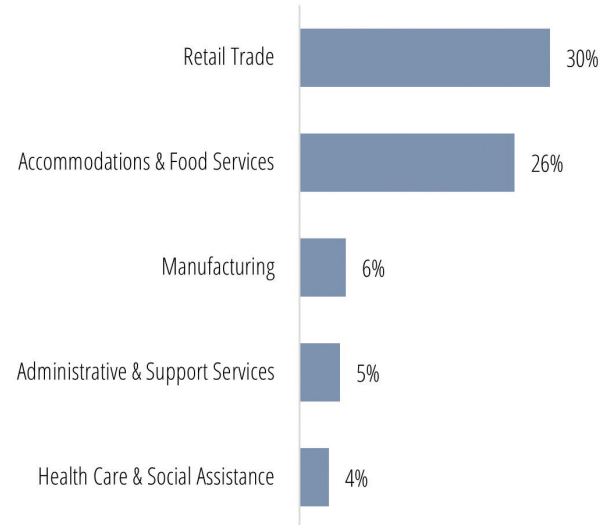| COLLEGE |
|---|
| Angelina College |
| Stephen F. Austin State University |
| Panola College |
| Texas A&M University |
| Tyler Junior College |

FIGURE 20. INDUSTRIES WHERE EMPLOYED
Percent of all Employed

Industry	Percent
Retail Trade	30%
Accommodations & Food Services	26%
Manufacturing	6%
Administrative & Support Services	5%
Health Care & Social Assistance	4%

*Not Located - High school graduates not found either as college enrolled (in a Texas public college or university in the fall semester following graduation) or employed (not found in the 4th quarter of Texas employment data as reported by the Texas Workforce Commission).
Source: Texas Public Education Information Resource (TPEIR).

ABOUT THIS WORK

This profile is part of the Rural East Texas Economic Opportunity Analysis series commissioned by the T.L.L. Temple Foundation. The goals of this work are to strengthen the alignment of and linkages between the talent pipeline and key industry clusters in rural East Texas.

The original series of reports, released in January 2022, defined three economic sub-regions: Northeast Texas centered on Texarkana, Deep East Texas centered on Lufkin and Nacogdoches, and Southeast Texas centered on Beaumont and Port Arthur. The economic and labor market structure of each sub-region was profiled, detailing the key industry sectors, current and projected employment opportunities, and high-demand skills and credentials.

The current profile provides updated data to supplement the original report. Economic and labor market research was provided by Alexander Research and Consulting. Graphic design was completed by Safflor Design.

All profiles are available for download from the T.L.L. Temple Foundation's website at www.tlltemple.foundation.

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ABOUT THE PROJECT TEAM

SPONSORS

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BUILDING A THRIVING RURAL EAST TEXAS

The T.L.L. Temple Foundation works alongside rural communities to build a thriving East Texas and to alleviate poverty, creating access and opportunities for all.

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Alexander Research & Consulting provides insights and support to help organizations amplify their impact. I offer a wide range of services —research, analytics, program evaluation, strategic planning, and implementation support—with a specialization in community, economic, and workforce development.

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DESIGN

SAFFLOR DESIGN

For over 10 years, Safflor Design has been elevating their clients' work through elegant design.

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