



NASHVILLE

REGIONAL ECONOMIC DEVELOPMENT GUIDE

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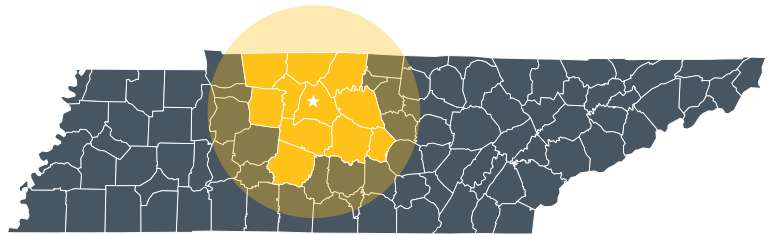
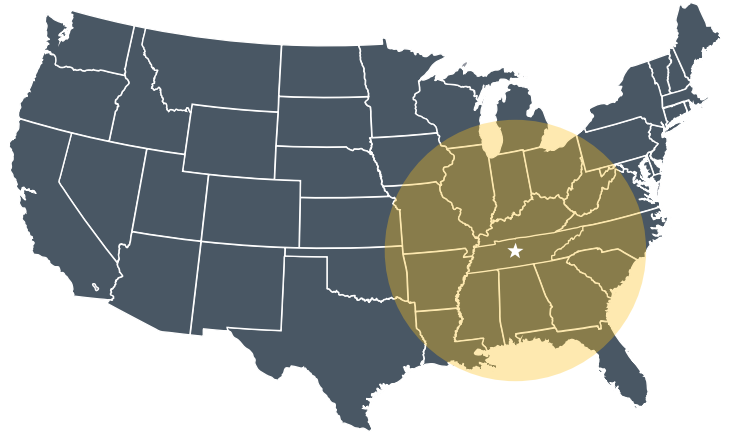


LOCATION

NASHVILLE

Strategically located in the heart of the Tennessee Valley, the Nashville region is where businesses thrive and creative spirit resonates across industries and communities. The Nashville economic market encompasses 10 counties and a population of more than two million making it the largest metro area in a five-state region. Many corporate headquarter giants call Nashville home including Nissan North America, Bridgestone Americas, Mitsubishi Motors North America, AllianceBernstein and iHeartMedia.

A national hub for the creative class, Nashville has the largest concentration of the music industry per capita in the United States. The Nashville region's educated workforce not only provides an abundant talent pool for companies, but it also bolsters the region's vibrancy, artistic and musical essence, and competitive edge in technology and innovation. The Nashville region is defined by a diverse economy, low cost of living and doing business, a creative culture and a well-educated population. Cultural diversity, unique neighborhoods, a variety of industries and a thriving creative community make Middle Tennessee among the nation's best locations for relocating, expanding and startup companies.



POPULATION GROWTH & TOP EMPLOYERS

NASHVILLE ECONOMIC MARKET

2014: 1,893,769
2019: 2,072,589

+9.4%

TENNESSEE

2014: 6,541,223
2019: 6,829,174

+4.4%



CHEATHAM

2014: 39,610
2019: 40,667

+2.7%

TOP EMPLOYERS

A.O. Smith Water Products
Arcosa Marine
Caymas Boats



DAVIDSON

2014: 669,611
2019: 694,144

+3.7%

TOP EMPLOYERS

Vanderbilt University Medical Center
HCA Healthcare
Vanderbilt University



DICKSON

2014: 50,465
2019: 53,948

+6.9%

TOP EMPLOYERS

Tennsco Corporation
Nemak
Conagra Foods



MAURY

2014: 85,384
2019: 96,387

+12.9%

TOP EMPLOYERS

GM Spring Hill Manufacturing
Maury Regional Medical Center
Tennessee Farm Bureau



MONTGOMERY

2014: 189,005
2019: 208,993

+10.6%

TOP EMPLOYERS

Trennova Healthcare
Trane Company
Agero



ROBERTSON

2014: 68,046
2019: 71,813

+5.5%

TOP EMPLOYERS

Electrolux Home Products
Macy's Logistics
NorthCrest Medical Center

The Nashville region's job growth has been in the top 5% of all metro areas in the country over the last 5-year period.

Sources: Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2019 (2019 Population Estimates); 2019 Book of Lists, Regional Chambers of Commerce



RUTHERFORD

2014: 288,848
2019: 332,285

+15.0%

TOP EMPLOYERS

Nissan North America
Ingram Content Group
Saint Thomas Health



SUMNER

2014: 172,269
2019: 191,283

+11.0%

TOP EMPLOYERS

Gap Inc.
ABC Technologies
Xtend Healthcare



WILLIAMSON

2014: 205,334
2019: 238,412

+16.1%

TOP EMPLOYERS

Tractor Supply
Community Health Systems, Inc.
Mars Petcare



WILSON

2014: 125,197
2019: 144,657

+9.4%

TOP EMPLOYERS

Amazon
CEVA Logistics
Cracker Barrel Old Country Store Inc.

U.S. POPULATION AROUND NASHVILLE

MORE THAN HALF OF THE NATION'S POPULATION RESIDES WITHIN 650 MILES OF NASHVILLE

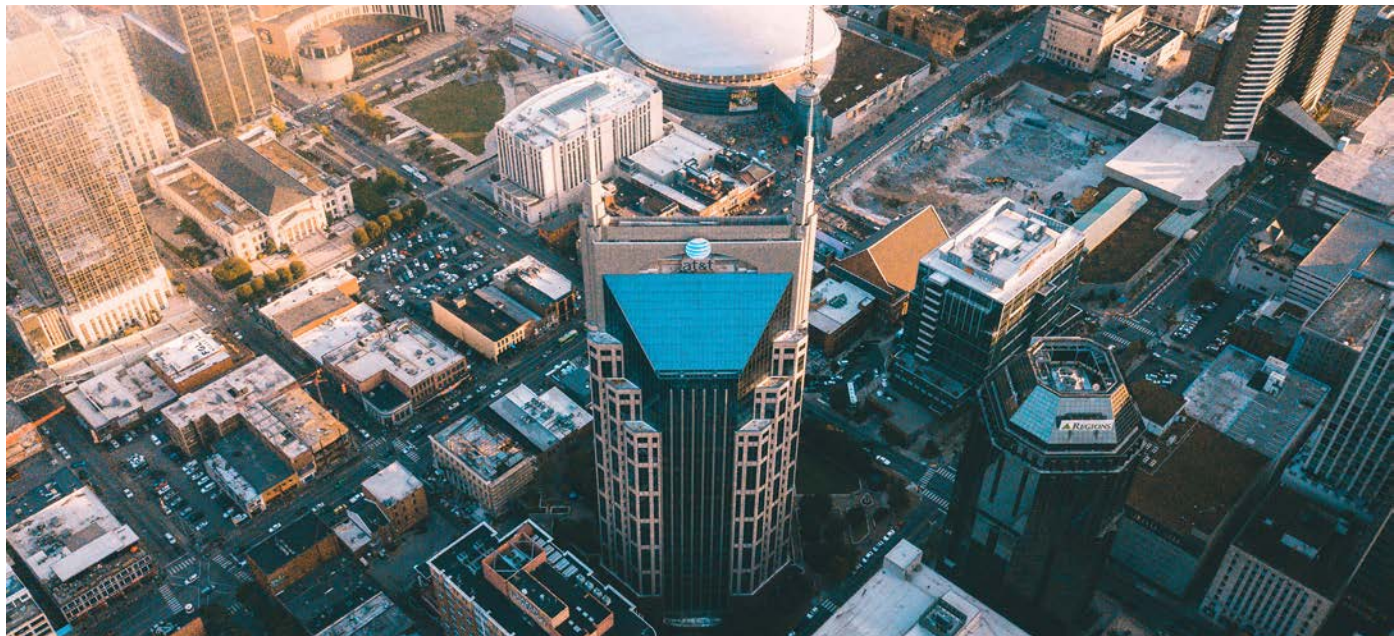
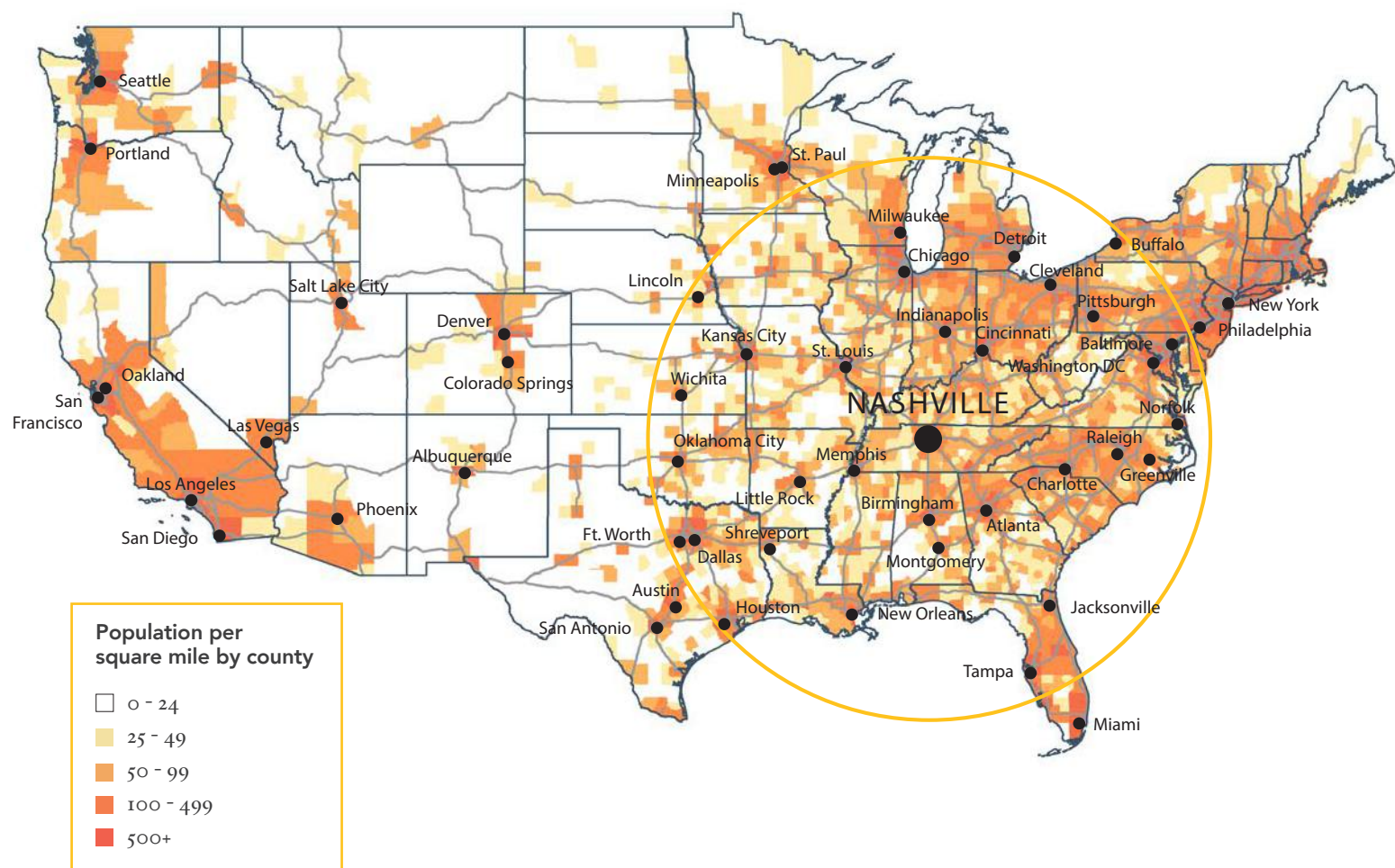


Photo courtesy of Jake Matthews



ECONOMY

ECONOMIC DRIVERS

The Nashville region's economy continues to be a key driver of business activity in Tennessee and the southeast region. The area benefits from a diverse economy. With a balance of health care, technology, corporate operations, manufacturing and supply chain management, Nashville is one of the country's most attractive growth centers. Nashville has ranked within the top 10 large metros for job growth and population growth for the past eight years. The Nashville region experiences low unemployment, steady in-migration and a favorable business climate making it a top location for companies looking to relocate or expand their business.

HEALTH CARE MANAGEMENT

362,560
JOBS
(126,996 DIRECT JOBS)

\$67 BILLION
ANNUAL ECONOMIC IMPACT

MUSIC & ENTERTAINMENT

110,656
JOBS
(32,608 DIRECT JOBS)

\$15.9 BILLION
ANNUAL ECONOMIC IMPACT

MANUFACTURING

236,613
JOBS
(86,425 DIRECT JOBS)

\$69.7 BILLION
ANNUAL ECONOMIC IMPACT

TOURISM & HOSPITALITY

259,170
JOBS
(127,658 DIRECT JOBS)

\$20.5 BILLION
ANNUAL ECONOMIC IMPACT

Sources: Healthcare Council Economic Impact Study, September 2018 and Nashville Area Chamber of Commerce Research Center, 2020

50,473 BUSINESS ESTABLISHMENTS (NASHVILLE MSA)

Professional, Scientific and Technical Services **(6,671)**
 Retail trade **(6,129)**
 Other Service (except Public Administration) **(4,946)**
 Health Care and Social Assistance **(4,294)**
 Accommodation and Food Services **(4,188)**
 Wholesale Trade **(3,970)**
 Construction **(3,964)**
 Administrative Support, Waste Management and Remediation Services **(3,296)**
 Finance and Insurance **(3,191)**
 Real Estate and Rental and Leasing **(2,106)**

Manufacturing **(1,871)**
 Information **(1,611)**
 Arts, Entertainment and Recreation **(1,496)**
 Transportation and Warehousing **(1,308)**
 Educational Services **(657)**
 Management of Companies and Enterprises **(528)**
 Agriculture, Forestry, Fishing and Hunting **(128)**
 Utilities **(45)**
 Unclassified **(38)**
 Mining, Quarrying, and Oil and Gas Extraction **(36)**

Source: BLS QCEW 2018

TOP REGIONAL EMPLOYERS

**National, regional or division headquarters*

LOCAL EMPLOYEES

Vanderbilt University Medical Center*	24,039
Nissan North America*	12,000
HCA Healthcare Inc.*	10,600
Vanderbilt University*	10,331
Saint Thomas Health*	8,335
Randstad	4,550
Asurion*	4,170
Community Health Systems Inc.*	3,878
Amazon	3,692
Lowe's Cos. Inc.	3,614
The Kroger Co.	3,520
Electrolux Home Products North America	3,400
Cracker Barrel Old Country Store Inc.*	3,389
Bridgestone Americas Inc.*	3,335
National Healthcare Corp.	3,028
Shoney's*	3,000
Walgreens	2,716
Dollar General Corp.*	2,671
Gaylord Opryland Resort & Convention Center*	2,500
A.O. Smith Corp.	2,254
AT&T Inc.	2,250
SmileDirectClub*	2,118
UnitedHealthcare	1,984
Ingram Content Group Inc.*	1,957
AdvancedHEALTH	1,932
LifePoint Health*	1,866
GEODIS	1,773
Dell	1,750
Deloitte	1,698

Source: Book of Lists, 2019

TOP REGIONAL EMPLOYERS

**National, regional or division headquarters*

LOCAL EMPLOYEES

Tyson Food Inc.	1,600
UBS	1,543
Goodwill Industries of Middle Tennessee*	1,480
Lee Co.*	1,418
Schneider Electric	1,416
Tractor Supply Co.*	1,404
Williamson Medical Center*	1,382

Source: Book of Lists, 2019

FORTUNE 500 / 1000 COMPANIES HEADQUARTERED IN THE NASHVILLE REGION 2020 RANKING

HCA Healthcare	67
Dollar General	112
Community Health Systems	241
Delek US Holdings	342
Tractor Supply	380
Brookdale Senior Living	638
Acadia Healthcare	760
Cracker Barrel Old Country Store	767
Louisiana-Pacific	919
Genesco	948

Source: Fortune, 2020

DOING BUSINESS

CORPORATE BUSINESS CLIMATE

Corporate income tax rate	6.50%
Personal income tax rate	0%
Franchise tax	0.25%
Sales tax rate	7% state (2.25- 2.75% Local)
Right-to-work state	Yes
State labor force	3,346,720
Regional labor force	1,081,726
Cost of doing business	#1/200
CNBC state business friendliness ranking	13
CEO magazine business climate ranking	3
State and local per capita tax burden ranking	47 (4th lowest) 7.3% per capita tax burden.
Cost-of-living index	98.5
Average Class A office lease rate	\$34.08
Average marketwide office lease rate	\$28.04
Average lease rate - industrial	\$7.33

COUNTY PROPERTY TAX RATES*

Cheatham	\$2.47660
Davidson	General Services District - \$3.788 Urban Service District - \$4.221
Dickson	\$2.35000
Maury	\$2.23640
Montgomery	\$2.99000
Robertson	\$2.57590
Rutherford	\$2.21940
Sumner	\$2.26200
Williamson	\$2.22000
Wilson	\$2.51890

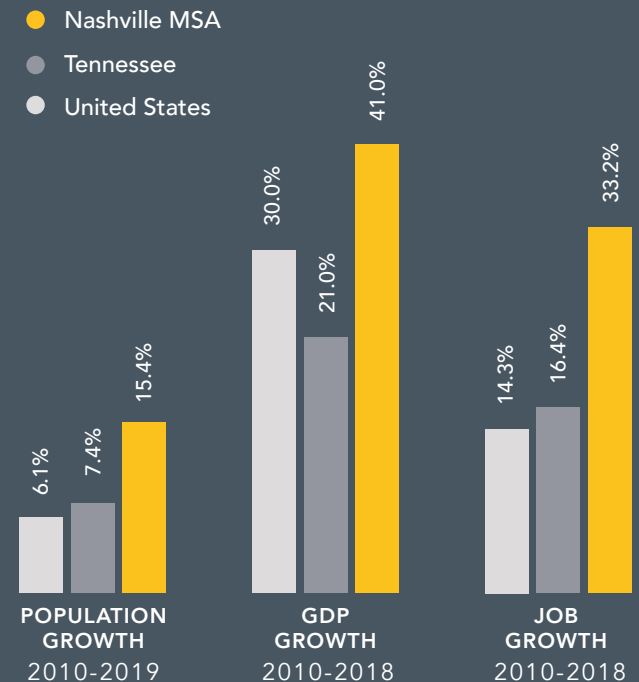
*Rates per \$100 of assessed value. Cities may assess additional property tax on top of county rates. Property taxes are assessed at the following assessment ratios:
Residential and Farm Real Property = 25%
Commercial and Industrial Real Property = 40%
Commercial and Industrial Personal Property = 30%

UNPRECEDENTED GROWTH

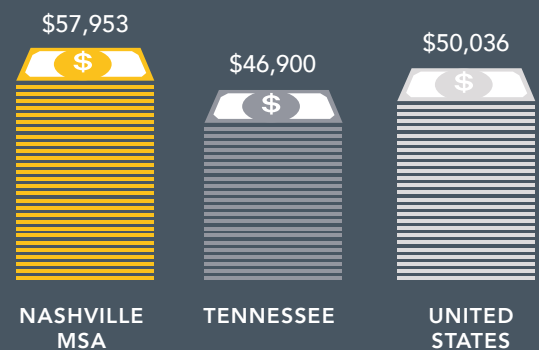
UNEMPLOYMENT RATE (2019)



KEY ECONOMIC INDICATORS



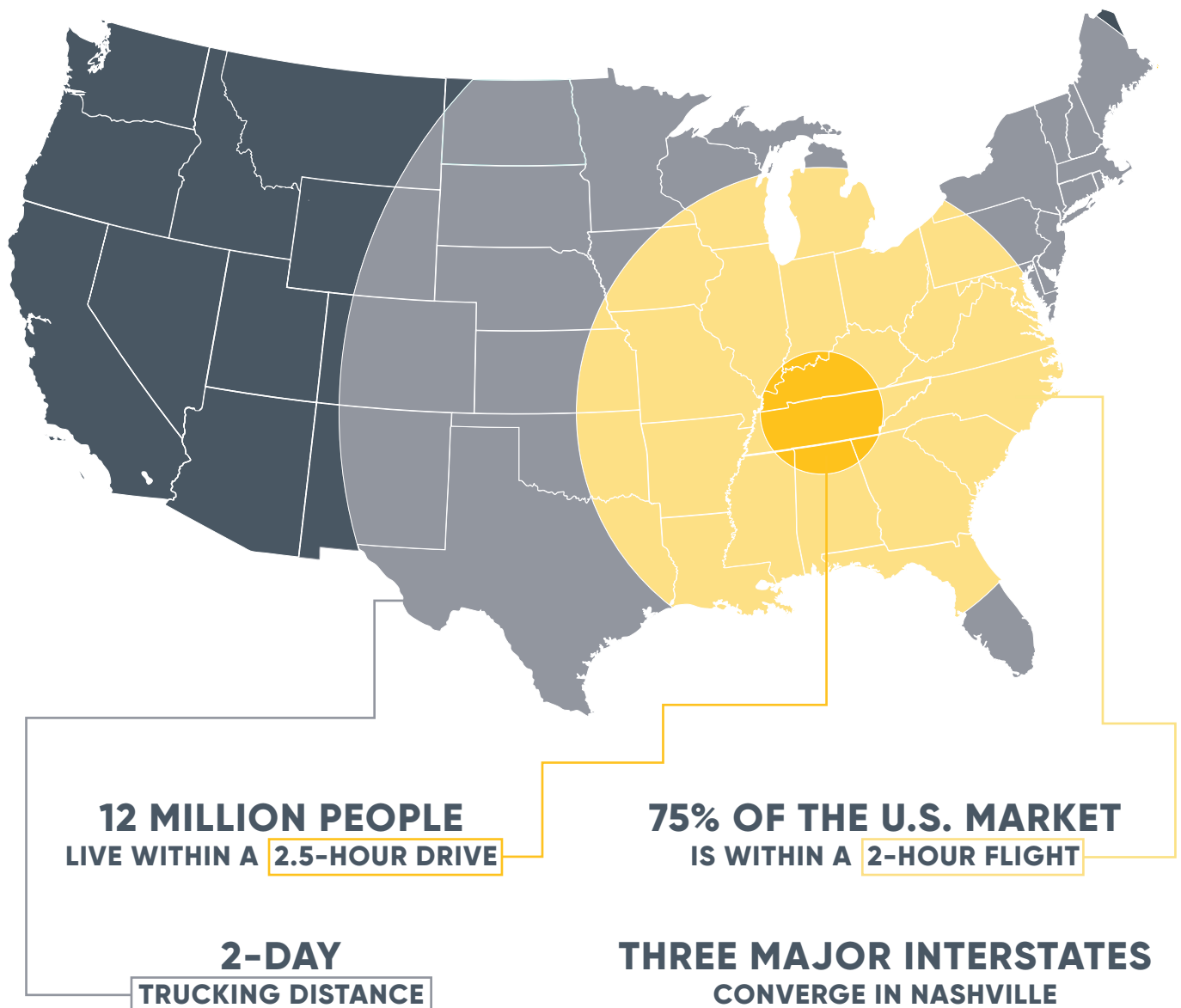
PER CAPITA INCOME (2018)



Sources: BLS Local Area Unemployment Statistics, Area Development Magazine, CoStar, Q4 2019; TN Comptroller of the Treasury and Metro Government of Nashville & Davidson; BLS Labor Force Statistics from the Current Population Survey; Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2019; BEA, Real GDP in 2012 Chained Dollars; and QCEW Annual Numbers; BEA, National Income and Product Accounts, 2019; BEA, SAINCI, 2018, and BEA, CAINCI, 2018

ACCESSIBILITY & TRANSPORTATION

The Nashville region is centrally located within the United States providing a competitive advantage to businesses that locate here. Nashville's location and expansive modes of transportation allow manufacturing and logistics businesses to reach U.S. and international locations with ease and affordability. Tennessee shares a border with eight states providing connectivity to the southeast region and beyond.





AIR

Nashville International Airport (BNA) is located only eight miles from downtown.

The airport averages 576 daily flights and provides service to nearly 19 million passengers annually.

BNA is served by 15 carriers with flights to more than 75 non-stop destinations.

4th fastest growing airport among the top 50 airports in North America and the 33rd busiest airport in the US.



ROAD

Nashville is one of only six U.S. cities at the convergence of three major interstate highways – I-40, I-65 and I-24.

The 440 Parkway downtown loop and Briley Parkway link the urbanized areas; Route 840 connects four counties in an outer loop.

140 freight carriers and 150 truck terminals.



RAIL

CSX Transportation has two major rail yards in Nashville, as well as an Intermodal terminal, TDSI automatic distribution terminal and TRANSFLO terminal. Nashville is CSX's division headquarters.

Goods can travel on rail to Memphis, then to Canada or from Nashville directly to the Port of Savannah.



WATER

Port of Nashville on the Cumberland River; nine-foot navigation channel accessible to Ohio River, Mississippi River and Gulf of Mexico.



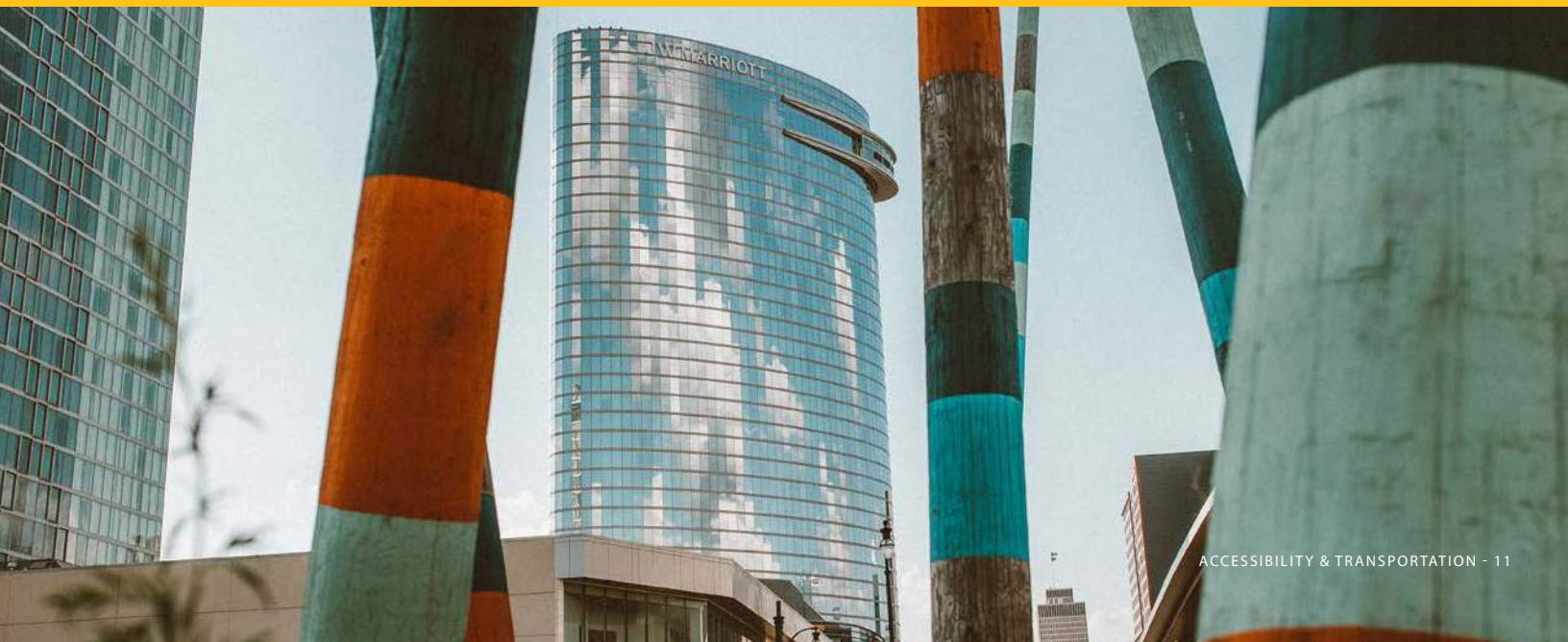
TRANSIT

WeGo intercity bus system

Music City Star suburban rail

Nashville B-cycle bike-share system

Rideshare and motorized scooter services



INTERNATIONAL BUSINESS

The Nashville region is one of America's most dynamic locations for business growth offering a strategic and welcoming place for international companies to expand and grow their operations. Centrally located in the southeastern United States, 75% of the U.S. market is within a 2-hour flight and 12 million people live within a 2.5-hour drive. Nashville is home to a diverse mix of global brands making the region their U.S. base of operations for manufacturing, corporate operations, sales, distribution and R&D. Some of the corporations calling Nashville home include Nissan North America, Bridgestone Americas, Mitsubishi Motors North America, Hankook Tire Co., Schneider Electric, UBS, Magna, HCA Healthcare and Amazon. It is easy to see the diversity present in every aspect of Music City. No city of similar size offers an environment with as much potential for international trade and investment.

ON AVERAGE,
20%
OF NEW JOB
ANNOUNCEMENTS
ARE CREATED
THROUGH
FOREIGN DIRECT
INVESTMENT.

346
FOREIGN-OWNED
COMPANY LOCATIONS
REPRESENTING 33 COUNTRIES
EMPLOY MORE THAN
52,000 PEOPLE
IN OUR REGION.

NISSAN, BRIDGESTONE,
DENSO PLUS 70 OTHER
JAPANESE-OWNED
COMPANIES HAVE
OPERATIONS IN THE
NASHVILLE REGION, MAKING
JAPAN OUR LARGEST
FDI NATION.

STATEWIDE FDI
TOTALS
\$37.3 BILLION
AND SUSTAINS OVER
147,000 JOBS.
(CERT, 2020)

NISSAN NORTH AMERICA

In 1980, Nissan North America chose the Nashville region for its first North American automotive assembly facility - the largest facility ever built by a foreign manufacturer in the U.S. at that time.

In 2005 Nissan announced it would move its North American headquarters from California to the Nashville region.

Today Nissan employs 12,000 people in the Nashville region.

**24% OF ALL
INBOUND MIGRATION
BETWEEN 2018 AND 2019
CAME FROM
INTERNATIONAL
LOCATIONS.**

(ESTIMATES OF THE
RESIDENT POPULATION
CHANGE: 2018
POPULATION)

NASHVILLE'S SISTER CITIES

- ★ Belfast, Northern Ireland
- ★ Caen, France
- ★ Chengdu, China
- ★ Edmonton, Canada
- ★ Kamakura, Japan
- ★ Magdeburg, Germany
- ★ Mendoza, Argentina
- ★ Taiyuan, China
- ★ Tamworth, Australia

FOREIGN DIRECT INVESTMENT IN THE NASHVILLE REGION

LOCATIONS

EMPLOYEES

Japan	75	19,493
France	33	5,815
United Kingdom	40	3,735
Germany	25	3,630
Canada	23	3,070

NASHVILLE MSA EXPORT PRODUCTS (2018)

EXPORTS

Transportation Equipment Manufacturing	\$3,537,041,949
Computer and Electronic Product Manufacturing	\$1,474,263,464
Electrical Equipment, Appliance and Component Manufacturing	\$ 637,378,179
Chemical Manufacturing	\$ 428,296,821
Plastics and Rubber Products Manufacturing	\$ 382,012,868
All Others	\$ 2,264,673,780
Total	\$ 8,723,667,061

TENNESSEE RANKS SECOND AMONG STATES FOR TOTAL JAPANESE FOREIGN DIRECT INVESTMENT.

TENNESSEE HAS RANKED IN THE TOP 10 NATIONALLY FOR NEW FDI JOB COMMITMENTS SINCE 2013 RISING TO #1 IN 2013 AND 2015 AND RANKING #2 IN 2018.

(IBM GLOBAL LOCATION TRENDS REPORT, 2019).

SME'S ACCOUNT FOR ROUGHLY 81% OF NASHVILLE GOODS EXPORTERS.
(ITA)

TRADING PARTNERS (2018)

EXPORTS

Canada	\$2.9 billion
Mexico	\$1.6 billion
Japan	\$520 million
China	\$502 million
Hong Kong	\$349 million

Sources: International Trade Administration and US Department of Commerce; Estimates of the Resident Population Change: 2018 Population Estimates



"Nashville is a vibrant city that attracts tourists and corporate groups into our hotels and corporations into our high rise buildings. The diversity of industry, high quality of life, and lower cost of living make it a place people want to live and where businesses want to invest."

-Elizabeth Randall Winkle, Chief Strategy Officer, STR

NASHVILLE'S FOREIGN INVESTMENT HIGHLIGHTS

1960

○ THE TRANE COMPANY
IRELAND

1970

○ TRIDON
CANADA

○ WILSON
SPORTING GOODS
FINLAND

○ TOSHIBA AMERICA
CONSUMER PRODUCTS
JAPAN

1980

○ MAHLE FILTER SYSTEMS
NORTH AMERICA, INC
GERMANY

○ TEKSID ALUMINUM
ITALY

○ NEMAK
MEXICO

○ ALCOA FUJIKURA

○ BRIDGESTONE AMERICAS, INC

○ NISSAN MOTOR
MANUFACTURING

○ SONY MUSIC

○ UNIPRES USA, INC.
JAPAN

○ SQUARE D
FRANCE

1990

PERMOBIL
SWEDEN

FEINTOOL, INC
SWITZERLAND

WILLIS NORTH AMERICA, INC

FIBERWEB, INC
U.K.

FLORIM, USA
ITALY

CINRAM
SITEL
CANADA

2000

AKZO NOBEL
NETHERLANDS

PRATT INDUSTRIES USA
AUSTRALIA

ELECTROLUX
HOME PRODUCTS
SWEDEN

EMBRAER
BRAZIL

CARLEX GLASS
AMERICA, LLC

DAIEI AMERICA

IB-TECH
JAPAN

KYOWA AMERICA

NHK SEATING OF AMERICA

MITSUBISHI MOTOR
NORTH AMERICA

MAPLEHURST
BAKERIES
CANADA

KHS AMERICA
TAIWAN

MOBILE MENTOR
NEW ZEALAND

GLOBAL SHARES
IRELAND

WIRTGEN AMERICA
GERMANY

NISSAN NORTH AMERICA

CONSULATE-GENERAL
OF JAPAN

RICOH BUSINESS
SOLUTIONS

SEKISUI PLASTICS

TACLE SEATING
JAPAN

QUANTA COMPUTERS
WEI-CHUAN USA, INC
TAIWAN

SAMICK MUSIC CORPORATION
SOUTH KOREA

VALEO

ALLIANCEBERNSTEIN

MERSEN
FRANCE

MEDACTA

UBS
SWITZERLAND

MARTINELLI ETTORE

BERETTA

UST
ITALY

TRIANGLE TIRE

SINOMAX USA

AMERICAN WONDER
PORCELAIN
CHINA

HANKOOK TIRE

LG ELECTRONICS

ATLASBX
SOUTH KOREA

PHILIPS
NETHERLANDS

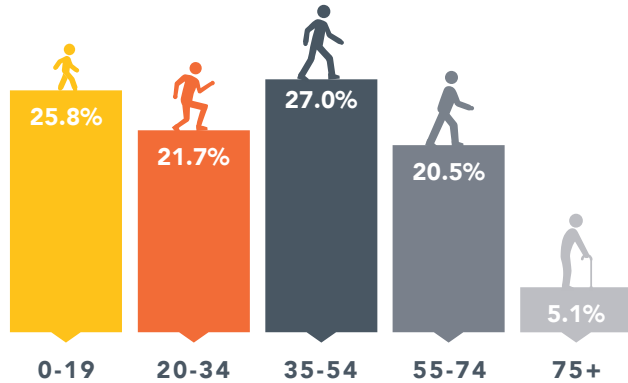
2020

DEMOGRAPHICS

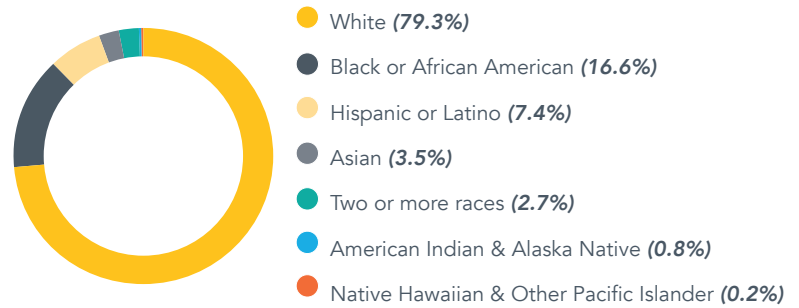
NASHVILLE MSA

US Census, ACS 2019 1 Year Estimates

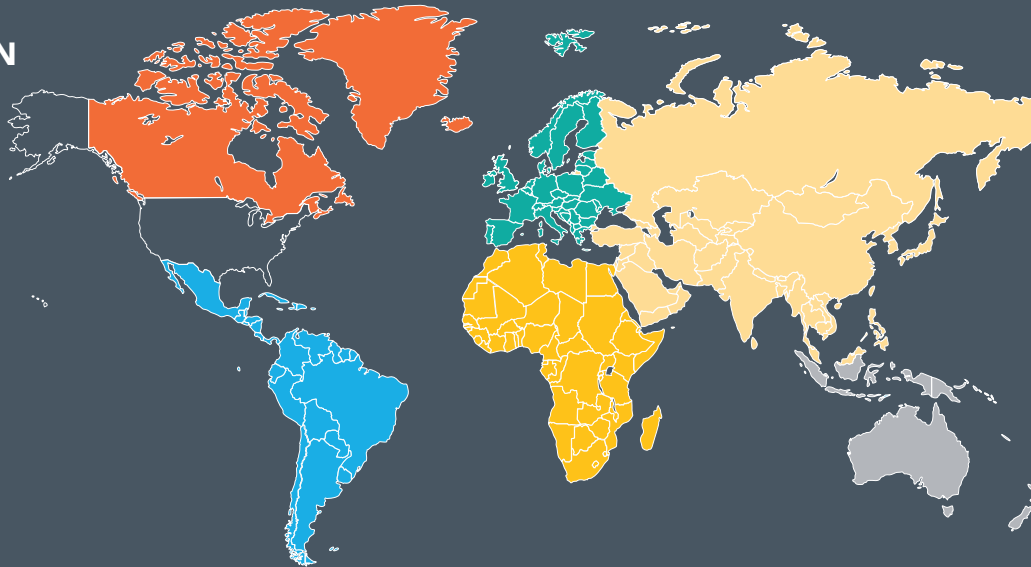
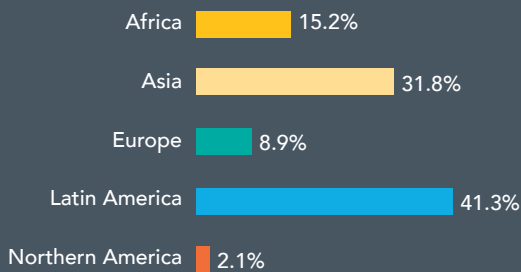
AGE



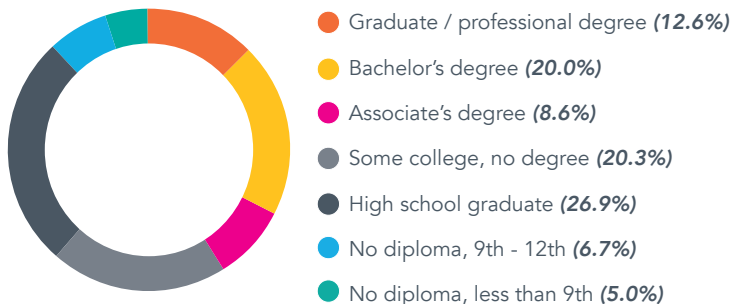
RACE/ETHNICITY



FOREIGN-BORN POPULATION BY WORLD REGION OF BIRTH



EDUCATIONAL ATTAINMENT AGE 25 YEARS AND OLDER



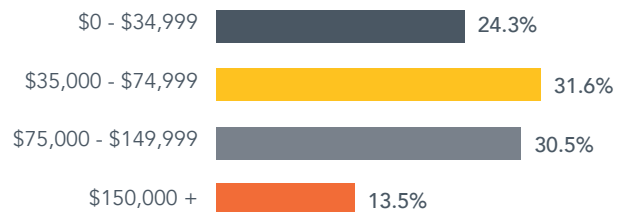
HOUSEHOLD INCOME & SIZE



Average household
size: **2.60 people**



Median household
income: **\$63,939**



Source: US Census, ACS 2018 1 Year Estimates



NASHVILLE MSA TOTAL POPULATION: 1,934,317



THE NASHVILLE REGION GAINED 81 NET NEW PEOPLE PER DAY ON AVERAGE (2018-2019)



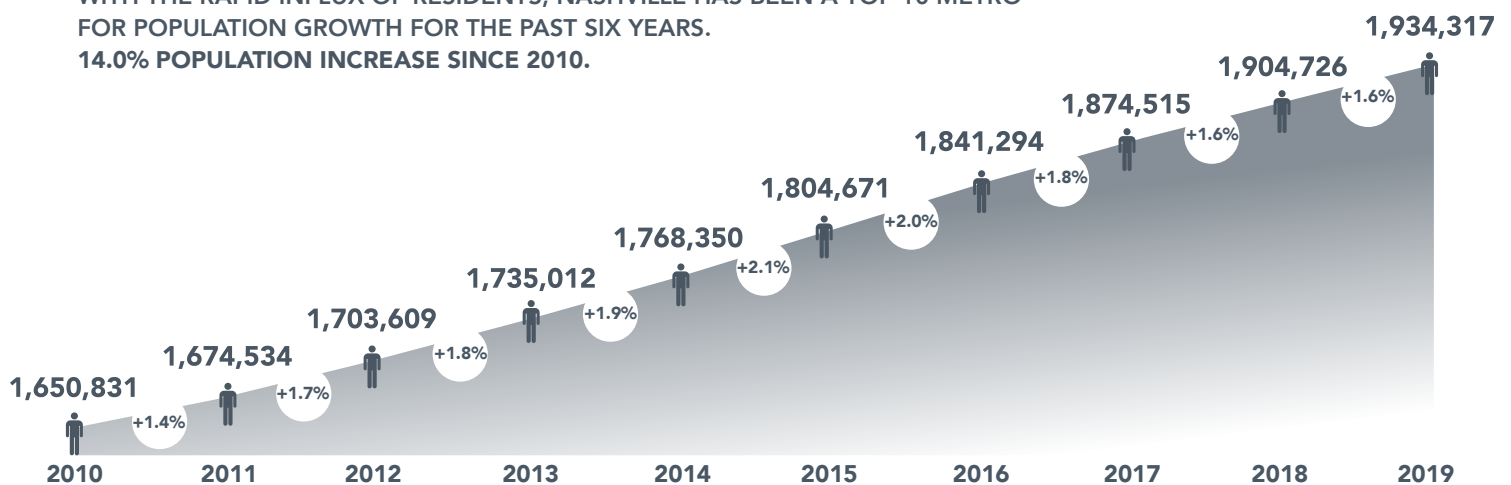
IN THE NASHVILLE REGION, MORE THAN 29,591 RESIDENTS HAVE BEEN ADDED SINCE 2017.



POPULATION PROJECTIONS PREDICT THAT MORE THAN 2.5 MILLION WILL LIVE IN THE NASHVILLE AREA BY 2040.



WITH THE RAPID INFLUX OF RESIDENTS, NASHVILLE HAS BEEN A TOP 10 METRO FOR POPULATION GROWTH FOR THE PAST SIX YEARS.
14.0% POPULATION INCREASE SINCE 2010.



Sources: : Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2019 (2019 Population Estimates)

TALENT & WORKFORCE

Photo courtesy of Vanderbilt University

Middle Tennessee is a magnet for talent, young graduates and the types of workers new and growing industries seek. Considered a national hub for the creative class, the Nashville region's educated workforce provides an abundant talent pool for companies. This workforce bolsters the region's vibrancy, artistic and musical essence, and competitive edge in technology and innovation. The Nashville region supports many innovative and aggressive local programs to recruit workers to the region and many of Nashville's most valuable workers come from the area's vast educational system with its 20 accredited four-year, two-year, tech schools and postgraduate institutions. More than 124,000 students are enrolled in higher education in the Nashville region, the largest concentration in a four-state region. The Nashville region retains 60 percent of these graduates annually. Thirty-three percent of residents over age 25 have a bachelor's degree or higher, and 167,291 residents have graduate or professional degrees.



"Nashville emerged as the clear winner by every metric we analyzed: housing, education, cultural amenities, weather, cost of living, business friendliness, the ability to source the country's top talent, diversity and inclusion and more. No other city could compete."

-Seth Bernstein, president and CEO of AllianceBernstein

1,934,317

**TOTAL
POPULATION**

1,081,725

**TOTAL
LABOR FORCE**

68.3%

**LABOR
PARTICIPATION
RATE**

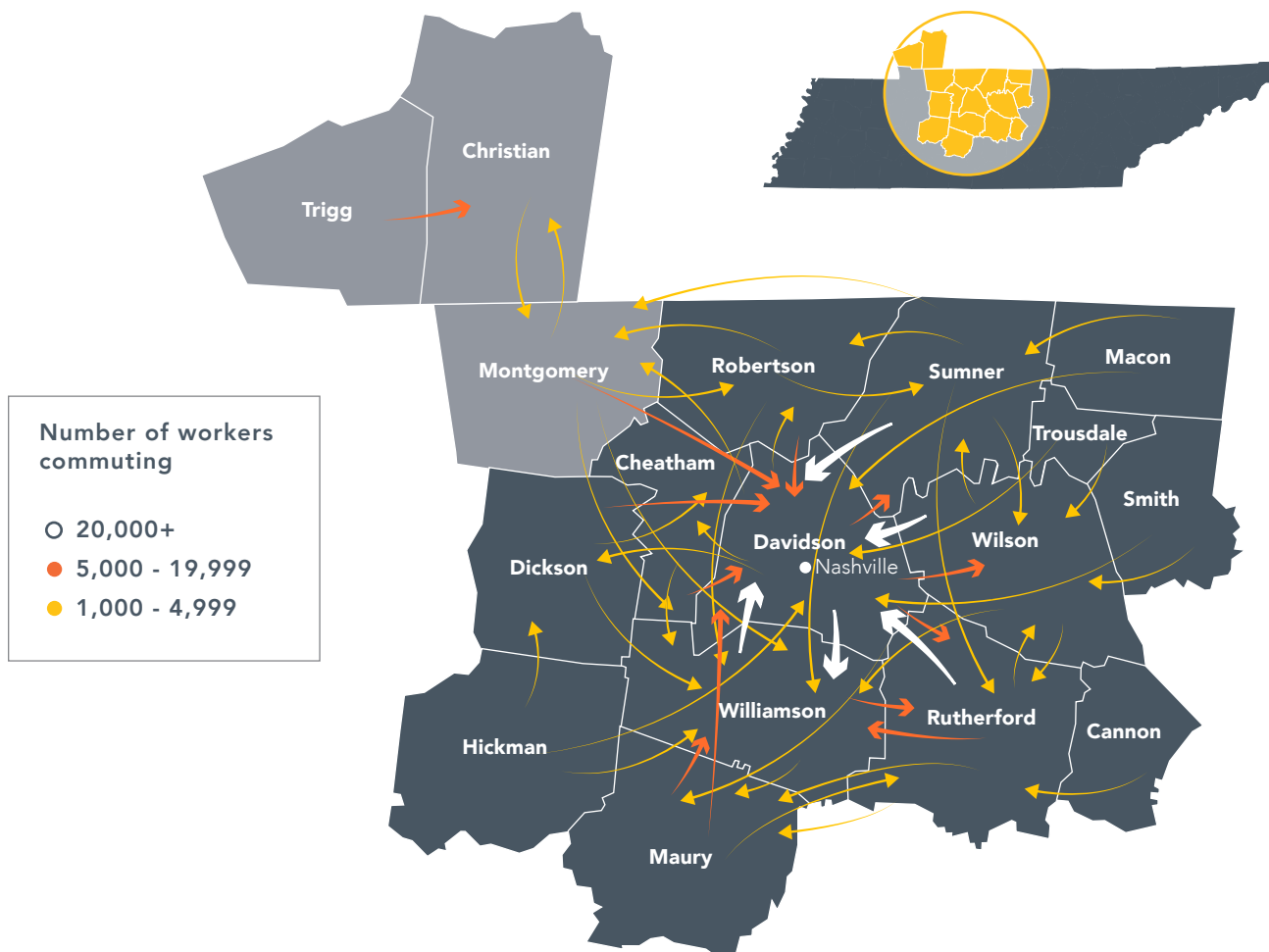
LABOR FORCE BY SECTOR


Source: BLS CES 2019

Service-Producing	83.63%
Professional and Business Services	15.77%
Educational and Health Service	14.30%
Goods-Producing	12.06%
Leisure and Hospitality	11.37%
Government	11.17%
Financial Activities	6.51%
Other Services	3.97%
Information	2.21%



REGIONAL COMMUTING PATTERNS





INDUSTRY SECTOR JOBS AND WAGE RATES	NASHVILLE JOBS	NASHVILLE MEDIAN SALARY	U.S. JOBS	U.S. MEDIAN SALARY
Accommodation and food services	104,886	\$23,322	14,361,049	\$22,462
Administrative support, waste management services	88,371	\$40,320	10,223,224	\$41,457
Agriculture, forestry, fishing and hunting	5,935	\$14,826	2,124,629	\$38,331
Arts, entertainment and recreation	22,324	\$77,168	3,177,951	\$38,004
Construction	57,290	\$61,057	9,135,425	\$59,168
Educational services	69,957	\$49,262	12,954,607	\$51,191
Finance and insurance	46,909	\$100,632	6,272,293	\$114,776
Government	46,507	\$56,103	7,448,008	\$66,882
Health care and social assistance	138,871	\$61,245	22,890,899	\$52,428
Information	22,686	\$76,210	3,124,679	\$113,337
Management of companies and enterprises	23,964	\$134,468	2,394,038	\$129,239
Manufacturing	85,547	\$62,641	13,147,370	\$69,449
Other services (except public administration)	51,341	\$32,210	7,118,827	\$33,867
Professional, scientific, and technical services	71,932	\$89,527	10,697,568	\$96,207
Real estate and rental and leasing	20,347	\$60,862	2,749,541	\$61,562
Retail trade	104,198	\$34,766	16,473,622	\$33,252
Transportation and warehousing	61,396	\$47,385	7,140,852	\$54,666
Utilities	3,990	\$83,539	816,756	\$103,230
Wholesale trade	40,018	\$77,222	6,046,800	\$79,676

Source: Cbmura, 2019

THE TALENT PIPELINE

MORE THAN 124,000
STUDENTS ATTEND THE AREA'S
COLLEGES AND UNIVERSITIES.

60% OF COLLEGE GRADUATES
REMAIN TO WORK IN THE REGION.

24,916 DEGREES AND CERTIFICATES AWARDED
TO GRADUATES OF NASHVILLE-AREA
COLLEGES AND UNIVERSITIES IN 2018.

ENROLLMENT IN HIGHER EDUCATION

ACCREDITED 4 YEAR AND POSTGRAD	LOCATION	ENROLLED 2018
Middle Tennessee State University	Murfreesboro	21,631
Vanderbilt University	Nashville	12,824
Austin Peay State University	Clarksville	10,954
Tennessee Technological University	Cookeville	10,168
Belmont University	Nashville	8,260
Tennessee State University	Nashville	7,774
Bethel University	McKenzie	5,407
Lipscomb University	Nashville	4,620
Trevecca Nazarene University	Nashville	3,927
Cumberland University	Lebanon	2,405
University of the South	Sewanee	1,785
Meharry Medical College	Nashville	828
Fisk University	Nashville	780
ACCREDITED 2 YEAR INSTITUTIONS AND TECH SCHOOLS		
Volunteer State Community College	Gallatin	9,154
Nashville State Community College	Nashville	8,284
Motlow State Community College	Lynchburg	6,886
Columbia State Community College	Columbia	6,221
Tennessee College of Applied Technology	Nashville	888
Tennessee College of Applied Technology	Dickson	713
Tennessee College of Applied Technology	Murfreesboro	539
Total		124,048

Source: National Center for Education Statistics, 2018

EDUCATIONAL AWARDS BY CATEGORY, NASHVILLE MSA

PROGRAMS AND OCCUPATIONS	2018 AWARDS
Agriculture, Agriculture Operations, and Related Sciences	157
Area, Ethnic, Cultural, Gender, and Group Studies	77
Biological and Biomedical Sciences	809
Business, Management, Marketing, and Related Support Services	3,006
Communication, Journalism, and Related Programs	488
Communications Technologies/Technicians and Support Services	188
Computer and Information Sciences and Support Services	541
Construction Trades	75
Education	1,554
Engineering	567
Engineering Technologies and Engineering-related Fields	316
English Language and Literature/Letters	252
Family and Consumer Sciences/Human Sciences	251
Foreign Languages, Literatures, and Linguistics	179
Health Professions and Related Programs	5,021
History	169
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	439
Legal Professions and Studies	371
Liberal Arts and Sciences, General Studies and Humanities	2,744
Library Science	5
Mathematics and Statistics	236
Mechanic and Repair Technologies/Technicians	1,123
Multi/Interdisciplinary Studies	696
Natural Resources and Conservation	9
Parks, Recreation, Leisure, and Fitness Studies	426
Personal and Culinary Services	600
Philosophy and Religious Studies	112
Physical Sciences	195
Precision Production	293
Psychology	759
Public Administration and Social Service Professions	379
Science Technologies/Technicians	1
Social Sciences	982
Theology and Religious Vocations	317
Transportation and Materials Moving	148
Visual and Performing Arts	1,431
Total	24,916

Source: EIM, Engineering Management Institute

ICEE'S COMMITMENT TO MIDDLE TENNESSEE

Why did ICEE choose to relocate your headquarters to Nashville?

Has this location been an important part of your success?

ICEE relocated to the Nashville region from California for several key reasons. One of the biggest reasons is that we are a nationwide company and the greater Nashville area puts us in a good central spot to be able to manage and operate our business effectively. The quality of life here in the Nashville area was another motivating factor. We want to attract the best talent to help us shape and grow our company in the future and we think we find that right here in Tennessee. One of the other motivating factors is the business supportive and friendly environment we received while looking for our new home.

What has your experience been in searching for talent in the Nashville region?

It has been fantastic to grow our team and add to the ICEE family from the diverse Nashville and Middle Tennessee talent. The team we have built has been strong, willing and able to help us build the type of company we want to be now and in the future. ICEE has expanded and grown our talent acquisition team to be able to efficiently hire the right people and we have found the local talent to be a great fit for our company.

Have there been any specific programs that have already helped your company succeed in the Nashville region?

From all aspects of the local government from the start through now we have received tremendous support in helping us through this transition.

What will ICEE do to make the Nashville region a better place to live, work and play?

We first and foremost want to contribute to the region and become a part of the community. ICEE creates smiles around the country and the world with our frozen beverages and we want that spirit to thrive throughout Tennessee. We are actively looking for opportunities to become involved in local Middle Tennessee charities through our ICEE CARES committee and to see how the spirit of ICEE can come to life in Nashville with public art.

Anything else you want to share?

We absolutely love it. Nearly every person in our company who visited Tennessee for the first time left with an eagerness to move here and start a new chapter in their lives. The food, the climate and the culture have been amazing perks!



"We are truly excited to call LaVergne, Tennessee the new home of The ICEE Company. Nashville is an incredible city and the region is experiencing growth that we felt was a perfect fit for our organization. This puts us in the greatest position to best serve our customers and to offer our team a fabulous quality of life. It is an honor to be a part of this vibrant community."

**- Dan Fachner, CEO
The ICEE Company**

WORKFORCE INITIATIVES

Free College for All

Tennessee's Drive to 55 initiative provides free tuition to technical and community colleges for all Tennesseans. Tennessee is the first state in the nation to offer tuition-free community or technical college to high school students and adults.

Tennessee Promise

Tennessee Promise is a scholarship program to help more Tennessee high school graduates attend college. Since the program launched in 2015, we've seen record application numbers and higher enrollment and retention rates. Students may use the scholarship at any of the state's 13 community colleges, 27 colleges of applied technology or other eligible institutions offering an associate degree program. Incredibly, most Promise students are the first in their family to go to college. Volunteer mentors through the tnAchieves program are a critical component to their success providing individual guidance to each participant as they navigate the college admissions process. For more information, visit tn.gov/tnpromise.

Tennessee Reconnect

Started in 2018, the Tennessee Reconnect program helps adults attend a community college or technical college and complete a postsecondary degree or credential, tuition-free. The joint effort includes public and private nonprofit higher education institutions, the region's workforce development boards, and community and employer partners. The goal of this program is to ensure each adult has access to resources and supports necessary to start and finish a college degree. This initiative will help adults enter higher education to gain new skills, enter jobs that pay well or advance in their current workplace. For more information, visit tnreconnect.gov.

TN Governor's Investment in Vocational Education (GIVE)

The Governor's Investment in Vocational Education (GIVE) is designed to foster long-term regional partnerships between Tennessee Colleges of Applied Technology (TCATs), community colleges, industry, economic development agencies and K-12 to identify and address skills gaps in local workforce pools.

- Focus on work-based learning and apprenticeship opportunities.
- Funding for four, fully funded dual enrollment credits in high school.

TN Governor's Future Workforce Initiative

Tennessee's Future Workforce initiative is designed to increase science, technology, engineering and mathematics (STEM) training in K-12 schools.

- 100 new middle school programs and tripling the number of STEM-designated public schools by 2022
- Increase number of teachers qualified to teach work-based learning and advanced computer science courses through STEM teacher training
- Increase high school student access to dual credit, AP, and dual-enrollment courses

Nashville GRAD

Nashville GRAD is a program through Nashville State Community College to provide financial and academic support for full-time students pursuing higher education. Nashville GRAD offers eligible students financial assistance for textbooks, transportation, industry certification fees, emergency needs and additional tools or equipment. Students also receive wraparound services including academic and career counseling. For more information, visit nscc.edu/admissions/nashville-grad.





Photo courtesy of Belmont University

YP Nashville

YP Nashville is a partnership between the Nashville Area Chamber of Commerce and more than 50 young professional organizations across the region working to engage, connect and empower young professionals to actively shape the future of the Nashville region. The goal of YP Nashville is to connect young professionals with various opportunities for professional development, community involvement and networking. Ultimately, YP Nashville works to advance regional prosperity by building the next generation of community leaders. For more information, visit ypnashville.org.

Apprenti Tennessee

The Greater Nashville Technology Council's Apprenti Tennessee program, the first technology-focused apprenticeship program in Tennessee, will create a new stream of technology workers and a chance for Nashville's tech community to intentionally bring women, veterans, minorities and other overlooked segments of the region's population into the tech workforce. The program will enhance access to those who may have the aptitude but have never had the necessary opportunity to land a higher paying tech job. Apprenti Tennessee combines paid on-the-job training and education with placement in highly skilled, salary-competitive occupations. The program works with the tech industry to identify mid-tier jobs ready to be filled by highly competent people regardless of educational background.



TARGET INDUSTRIES

Middle Tennessee’s economy is characterized by a diverse mix of industries. The Nashville Area Chamber of Commerce’s long-term economic development strategy has identified five target sectors that drive Middle Tennessee’s economy and provide a concentrated focus for strategic growth within the region: corporate services, health care management and information technology, advanced manufacturing, distribution and trade, and music and entertainment. Building on the Nashville region’s successes and core competencies, companies within these target sectors experience an existing network of existing expertise, strong growth potential, access to skilled workforce and decades of proven success.

CORPORATE SERVICES	HEALTH CARE MANAGEMENT & INFORMATION TECHNOLOGY	ADVANCED MANUFACTURING	DISTRIBUTION & TRADE	MUSIC & ENTERTAINMENT
Corporate and regional headquarters	Health care management	Automotive and parts manufacturing	Storage and distribution	Music production and publishing
Back office, data centers, shared services	Health information technology	Other manufacturing opportunities	Wholesale trade	Affiliated sectors

FINANCE GIANT ALLIANCEBERNSTEIN RELOCATES CORPORATE HEADQUARTERS FROM NYC TO NASHVILLE

Why did you choose to relocate your headquarters to Nashville?

After a thorough nationwide search (30 cities in 16 states), we chose Nashville as AB's new corporate headquarters because it is a vibrant and growing city that is committed to developing its infrastructure, supporting local business and attracting new talent. We also feel strongly that being one of the first major global financial services firm to plant a flag in Nashville puts us one step ahead of our competitors. While others are relocating to already saturated cities where there are increasingly fewer "first mover" advantages, we are establishing a unique presence in a dynamic market with tremendous growth potential.

We see Nashville as a game changer. It will allow us to both develop and retain talent while offering a high quality of life for our employees. We will be able to build an office of the future at our new offices at Fifth + Broadway, something we have already done in some of our other locations like Tokyo, Hong Kong and Boston. These are workplaces with more collaborative, flexible, modern staff amenities, and innovative technology. We want to foster a forward-looking culture and work environment as we enhance our competitive edge in an increasingly challenging marketplace.

What has your experience been in hiring talent in the Nashville region? Have you been successful recruiting qualified workers with skills needed?

Talent is one of the many reasons we chose Nashville. We think it is a magnet city for nationwide talent – on average, Nashville adds 100 people every day. The city is becoming known as a destination for expertise in technology and innovation, which are two areas AB is focused on as we continuously evolve our business to remain relevant and highly competitive. We conducted extensive due diligence on recruiting prospects across our various functions and are confident that Nashville not only has high-quality talent that can bring diverse experiences and perspectives to AB, but also a desirable location from which to recruit talent nationwide.

We are very pleased with the availability and quality of the local talent pool. We have hired more than 600 people across many different areas of the firm in the first year and we continue to actively recruit in the Nashville market. The

candidates we've met so far have given us confidence that we will be able to continue hiring qualified and talented people with the skills that we need.

How will AB contribute to Nashville's growing and evolving community?

We appreciate the importance and value Nashville and its residents place on philanthropy and civic duty. AB is committed to being a great corporate citizen to Nashville and we are working diligently to integrate into the community as seamlessly as possible while making a positive impact to the city we now call home.

To achieve this, we are working on structuring a centralized AB philanthropy and community engagement plan to roll out first in Nashville, with our other U.S. and international markets and communities to follow. We intend to contribute significantly through a strategic combination of volunteerism, financial sponsorship, community leadership and advocacy, particularly to outcome-driven initiatives in education and arts and culture. This plan will allow us to have a more powerful impact on important local initiatives that align with AB's core competencies and brand. Additionally, as Nashville is a new market for us, it gives us the opportunity to partner with the causes that we support as a firm, while providing volunteering, networking, and civic and board leadership opportunities for our employees.

CORPORATE SERVICES

The Nashville region has established itself as one of the most desirable headquarters and corporate office locations in America. The top driver of that growth is the region's strong talent pipeline. The Nashville region is home to more than 124,000 students who attend the region's higher education institutions with 60 percent choosing to remain in the area to work. Vanderbilt University, Middle Tennessee State University, Fisk University, Tennessee State University, Belmont University, Lipscomb University and a host of two-year institutions are just a few of the talent suppliers for the area's corporate offices. The Nashville region is also one of the most attractive metropolitan areas in the country for in-migration. Nashville gains an average of 81 net new residents per day providing the region's employers a continuous supply of available workforce.

Corporate headquarters in the region range from sectors including retail (Dollar General, Tractor Supply Company, Kirkland's, Genesco) to health care (HCA Healthcare, Community Health Systems, LifePoint, SmileDirectClub) to manufacturing (Nissan, Gibson Brands, Red Collar Pet Food, Bridgestone, Hankook Tire) and financial services (AllianceBernstein). The continued growth of these corporations in Nashville is driven by the regional talent pool, affordable operating costs and the ability to recruit key talent to the region. The Nashville region has also earned a reputation as a hotbed for technology, as companies like Lyft, iHeartMedia, Eventbrite, Pilot.com, Postmates, SmileDirectClub, and KeepTruckin' chose Nashville for east coast operations hubs. As Nashville continues to thrive, this evolution has become even more evident through the region's creative talent and a wealth of

LEADING HEADQUARTERS AND CORPORATE SERVICES COMPANIES

COMPANY	LOCAL EMPLOYEES
Vanderbilt University Medical Center and Monroe Carrell Jr. Children's Hospital at Vanderbilt	24,039
Nissan North America	12,000
HCA Healthcare Inc.	10,600
Vanderbilt University	10,331
Saint Thomas Health	8,335
Randstad	4,550
Asurion	4,170
Community Health Systems Inc.	3,878
Amazon.com	3,692
Lowe's Cos. Inc.	3,614
The Kroger Co.	3,520
Electrolux Home Products North America	3,400
Cracker Barrel Old Country Store Inc.	3,389
Bridgestone Americas Inc.	3,335
National Healthcare Corp.	3,028
Shoney's Inc.	3,000
Walgreens	2,716

Source: 2019 Book of Lists



CORPORATE SERVICES WAGES

OCCUPATION	JOB IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Human Resources Managers	1,700	\$48.12
Buyers and Purchasing Agents	2,150	\$28.59
Market Research Analysts and Marketing Specialists	4,280	\$30.84
Accountants and Auditors	11,680	\$34.90
Financial Specialists, All Other	3,890	\$35.40
Sales Representatives, Services, All Other	7,785	\$31.01
Switchboard Operators, Including Answering Service	350	\$15.58
Bill and Account Collectors	2,340	\$19.52
Billing and Posting Clerks	4,390	\$19.14
Payroll and Timekeeping Clerks	990	\$22.21
Customer Service Representatives	22,810	\$17.77
Receptionists and Information Clerks	7,050	\$13.94
Executive Secretaries and Administrative Assistants	3,040	\$27.55
Computer Operators	431	\$21.97
Data Entry Keyers	1,110	\$16.32

Source: BLS, Occupational Employment Statistics, May 2019
Release, Chmura Analytics 2019



"Expanding our presence in Nashville was the right business decision for UBS. As a longstanding member of the community, we knew this was a city with the talent capable of helping us grow."

-Wanda Lyle, managing director,
general manager of Nashville
Business Solutions Center, UBS

**#1 Metro for
Economic
Strength in 2020**

POLICOM, January 2020

**Vanderbilt,
Belmont and
Lipscomb
universities offer
top-ranked MBA
programs**

Bloomberg Business, 2019

**#1 City for
Job Seekers
in 2020**

MoneyGeek, 2020

**#2 Best Place
for New
Businesses**

SmartAdvisor, 2019

**167,291
people in
the Nashville
MSA have a
graduate or
professional
degree.**

*American Community
Survey 2018 1 Year
Estimates*

**2nd
Hottest
Job
Market
in the
Country**

*Wall Street
Journal, 2020*

**The Nashville region is home to 10 Fortune 1000 companies
including 5 Fortune 500 headquarters.**

Fortune, 2020

MITSUBISHI MOTOROS RELOCATES HEADQUARTERS FROM CALIFORNIA TO FRANKLIN

Why did you choose to relocate your headquarters to Franklin? Has this location been an important part of your success?

The move was part of an ongoing plan to reinvent every aspect of the Mitsubishi Motors brand in the U.S. Dynamic technology, entrepreneur and automotive scenes originally attracted us to Tennessee. Williamson County's schools, cost of living and community pride put our decision over the edge.

What has your experience been in hiring talent in the Nashville region? Have you been successful recruiting qualified workers with skills needed?

Absolutely. We've found great talent and built a passionate and enthusiastic team locally.

Have there been any specific programs that have helped your company succeed in the Nashville region?

The close working relationships we built with the Governor Lee, the State of Tennessee's economic and community development department, and the Williamson Inc. team in our transition made it seamless for us. We've only been here for a few months, but it feels like we've always been here.

What is Mitsubishi doing to make the Nashville region a better place to live, work and play?

We are building a corporate social responsibility program that allows employees to bring their time and their talents to the table. We will continue to grow and support our philanthropic relationships, but also explore ways to support the small business and entrepreneur communities in the area.

Anything else you want to share?

In searching across the country for the best place to move our headquarters office – taking into consideration the cost of doing business, cost of living, lifestyle, schools, climate and all the things that would make our employee team want to move, as well as the business climate the Nashville region and the state of Tennessee offer – choosing Franklin checked all the boxes important for us. Tennessee, and the greater Nashville area specifically, offer a strong automotive-focused worker pool – VW, Nissan, GM, Calsonic, Hankook Tire and others all have operations in the region. More importantly, the area offers a worker pool that is focused on other aspects – customer satisfaction, new business-thinking, brave new ways of doing business – that will be critical to the future of the Mitsubishi brand in the US.



INFORMATION TECHNOLOGY

The Nashville region has become a premier destination for innovation and creativity. A national hub for the creative class, Nashville enjoys the competitive advantages of having a creative culture, a well-educated population and a thriving technology industry. This strength is seen in the enterprising and entrepreneurial spirit of Nashville which creates a space for ingenuity and innovation.

The technology sector is the leading edge of the region's growth with thousands of technology job opportunities in fields from music and entertainment to health care to enterprise software development. The tech sector in Middle Tennessee is growing by 7.3% per year with an estimated 49,465 tech workers in 2018. From 2013-2018, the number of tech jobs in Middle Tennessee grew by 34% outpacing national tech job

growth by 14%. The tech industry has a \$6 billion impact on the Nashville economy. Nashville is stepping up its technology infrastructure to accommodate and encourage future growth with three Internet service providers offering gigabit Internet speeds. Google Fiber, Comcast and AT&T provide the infrastructure that further establishes Nashville as an advanced tech city that will now be able to better accommodate its population of entrepreneurs and software developers, as well as the growing number of individuals working from their homes.

Nashville's unparalleled creative community – with a mashup of musicians, artists, writers, developers and designers – translates into a tech scene unlike any other in America.

"TOP TEN CITIES FOR TECH JOBS"

- ZipRecruiter, 2018

"TECH JOBS IN THE NASHVILLE MSA GREW BY 34 PERCENT

OVER THE PAST 5 YEARS, OUTPACING OVERALL JOB GROWTH IN THE AREA BY 17 PERCENT AND NATIONAL TECH JOB GROWTH BY 14 PERCENT."

- Greater Nashville Technology Council, 2019

LEADING TECHNOLOGY EMPLOYERS

AllianceBernstein	EY	Pilot.com
Amazon	HCA Healthcare	Postmates
Anthem Inc.	HealthStream Inc.	Robert Half International
Asurion	Internal Data Resources	Teksystems
Change Healthcare	LBMC	UBS
Deloitte	Lifeway Christian Resources	Vanderbilt University and Medical Center
Dollar General Corp.	Lyft	Vaco
Eventbrite	Nissan	
eviCore Healthcare	Philips	

Source: State of Middle Tennessee Tech 2019, Middle Tennessee State University

AMAZON SELECTS NASHVILLE FOR A NEW OPERATIONS CENTER OF EXCELLENCE

In November 2018, Amazon announced that it had selected Nashville for a new Center of Excellence for its Operations business, which is responsible for the company's customer fulfillment, transportation, supply chain, and other similar activities. The Operations Center of Excellence in Nashville will create more than 5,000 jobs and will establish an Eastern U.S. regional hub for the technology and management functions of Amazon's Retail Operations division.

Why did you choose to relocate your Center of Excellence to Nashville? How will this location be important to your success?

We're thrilled to be here to take advantage of all that Nashville has to offer! Amazon Nashville will serve as the eastern U.S. hub for our retail operations business. In this office, we will have tech and management teams working on customer fulfillment, customer service, transportation, supply chain management, and more. Nashville has a talented and well-educated workforce. Strong university partners such as Vanderbilt, Belmont, Fisk University, Middle Tennessee State University and Tennessee State University (TSU) are among the schools training the best and the brightest in the region, along with university partners throughout Tennessee such as the University of Tennessee in Knoxville and the University of Memphis. This robust talent pipeline combined with Nashville's culture of innovation and creativity will support our growth for years to come.

Through our fulfillment center network and now our Nashville hub, we've enjoyed a mutually beneficial partnership with the State of Tennessee and the Middle Tennessee region for almost a decade. The next phase in this partnership is to create 5,000 new jobs in downtown Nashville and we are well on our way.

What has your experience been in hiring talent in the Nashville region? Have you been successful recruiting qualified workers with skills needed? Are there any specific programs or partnerships that make recruiting a workforce easier?

Since our announcement, we've successfully hired both entry-level and experienced technical professionals for roles in management and as individual contributors. This is a positive sign for our future hiring efforts in Middle Tennessee. Right now, we are focusing on preparing local candidates for Amazon's unique technical interview process. In partnership with the Greater Nashville Technology Council, we are hosting a series of technical interview training events. These events allow interested applicants to engage directly with engineers

from our Nashville teams to learn about Amazon's Leadership Principles and culture, which is core to our interview process. During these training events, attendees will be able to work through specific, technical interview questions with the guidance of seasoned Amazonians.

Have there been any specific programs that have helped your company succeed in the Nashville region?

Our goal is to engage with the Nashville business community in an impactful way. We are active members in five regional chambers -- the Nashville Area Chamber of Commerce, Nashville LGBT Chamber of Commerce, Nashville Area Hispanic Chamber of Commerce, Nashville Black Chamber of Commerce and the Tennessee Latin American Chamber of Commerce—as well as the Urban League of Middle Tennessee. These organizations have helped us strengthen our community partnerships while providing unique opportunities for us to support Nashville's growth and development.

How do you think Amazon will make the Nashville region a better place to live, work and play?

As a strong tech employer, we hope to provide the kind of opportunities that will encourage local university graduates to remain in Nashville where they have a vested interest in the success of the community and region. We will also continue to support local schools through programs such as Amazon Future Engineer (AFE), which is a childhood-to-career program aiming to inspire and educate students from all walks of life to try computer science and coding. This program is already in 27 Metro Nashville Public Schools.

At our core, Amazonians are committed to the communities where they live and work. As our team here continues to grow, you'll see our associates engage in all sorts of ways throughout Nashville and Middle Tennessee on issues they are passionate about. We believe that's good for Middle Tennessee and Amazon.

Anything else you want to share?

Since we first located a fulfillment center in Middle Tennessee, we have enjoyed being part of the region's tremendous growth. Nashville has become a destination for employers and workforce alike, drawn to the City's unique culture, burgeoning food scene, and creative energy. Middle Tennessee offers something for everyone—lively nightlife and live music, outdoor recreation and an incredible arts scene fueled by singers and songwriters. This makes Nashville a great place to live and work for all our associates. Amazon is excited about the addition of our Nashville hub to the downtown skyline and we look forward to growing here for years to come.

INFORMATION TECHNOLOGY OCCUPATION	JOBS IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Computer and Information research scientists	40	\$40.93
Computer network architects	1,040	\$47.86
Computer network support specialists	1,640	\$28.57
Computer occupations, all other	2,500	\$33.81
Computer programmers	1,460	\$45.45
Computer systems analysts	4,440	\$40.13
Computer user support specialists	4,270	\$23.88
Database Administrators and Architects	900	\$40.95
Information security analysts	900	\$37.57
Network and computer systems administrators	2,040	\$38.87
Software developers, systems software	2,245	\$44.86
Web Developers and Digital Interface Designers	790	\$30.27

Source: BLS, Occupational Employment Statistics, May 2019
Release, Chmura Analytics 2019

**No. 4 Best
Place in
America for
Starting a
Business**

Inc. Magazine, 2019

**Nashville is #12 overall on the
Surge Cities Index for best places
for startups. Within those rankings
Nashville was #5 overall for Job
Creation and #6 for Net Business
Creation. (2020)**

**Nashville is one of nine Google for Startups
Tech Hubs in the U.S. to help our local
Nashville startup community thrive.**

HEALTH CARE MANAGEMENT

Nashville is widely recognized as a national health care industry capital and global health care industry leader. With a reputation for dynamic, innovative health care companies, the Nashville region has a rich tradition of entrepreneurship and strong industry management talent. Nashville has helped shape the nation's health care landscape for the past four decades and continues to improve the delivery of patient care across the globe. The health care industry contributes an overall benefit of \$67 billion and 362,560 jobs to the local economy annually.

More than 500 health care companies are located in Middle Tennessee, making it the region's largest and fastest-growing industry. Seventeen publicly traded health care companies are headquartered in the region, with combined worldwide employment of nearly 570,000 and \$92 billion in global revenue. More than half of the privately-owned hospital beds in the U.S. are operated by Nashville-area companies. The region has also developed a network of professional service firms specializing in the health care industry – including legal, accounting, finance and real estate services.

**NASHVILLE'S HEALTH CARE
INDUSTRY DIRECTLY EMPLOYS
126,996 PEOPLE.**



"Nashville has long been known for its collaborative and entrepreneurial spirit, and in recent years, the city has gained a national reputation for cutting-edge technology and innovation. As a result, established healthcare companies like HCA Healthcare- along with startups and professional partnerships- are moving the industry forward and improving patient care not just here but everywhere."

**-Sam Hazen, Chief Executive
Officer, HCA Healthcare**

LEADING HEALTH CARE EMPLOYERS

LOCAL EMPLOYEES

Vanderbilt University Medical Center	24,039
HCA Healthcare Inc.	10,600
Saint Thomas Health	8,335
Community Health Systems Inc.	3,878
National HealthCare Corp.	3,028
United Healthcare	1,984
AdvancedHEALTH	1,932
LifePoint Health	1,866
Williamson Medical Center	1,382

Source: NBf, 2019

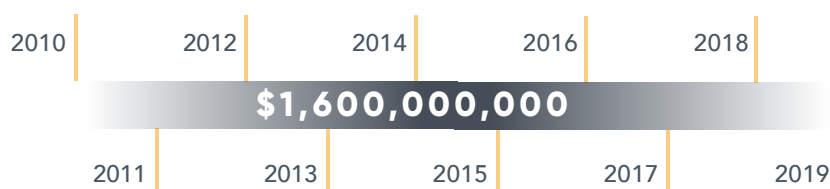
HEALTH CARE WAGES	JOB'S IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Clinical Laboratory Technologists and Technicians	2,700	\$25.72
Health Educators	399	\$19.13
Healthcare Social Workers	1,320	\$25.35
Home Health and Personal Care Aides	6,400	\$11.16
Licensed Practical and Licensed Vocational Nurses	7,220	\$21.39
Medical and Health Services Managers	4,180	\$51.84
Occupational Health and Safety Specialists	520	\$35.91
Purchasing Managers	520	\$59.28
Registered Nurses	21,600	\$31.28
Surgical Technologists	920	\$23.83

Source: BLS, Occupational Employment Statistics,
May 2019 Release, Chmura Analytics 2019

17 PUBLICLY TRADED HEALTH CARE COMPANIES IN THE NASHVILLE REGION.



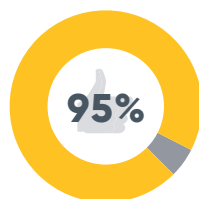
MORE THAN 1.6 BILLION IN VENTURE CAPITAL WAS INVESTED IN NASHVILLE HEALTH CARE COMPANIES OVER THE PAST 10 YEARS.



MORE THAN 500 HEALTH CARE COMPANIES HAVE OPERATIONS IN NASHVILLE AND WORK ON A MULTISTATE, NATIONAL OR INTERNATIONAL BASIS.



NASHVILLE IS HOME TO MORE THAN 400 PROFESSIONAL SERVICE FIRMS THAT PROVIDE EXPERTISE IN THE HEALTH CARE INDUSTRY.



95% OF HEALTH CARE CEOS INDICATE THAT A NASHVILLE HEADQUARTERS LOCATION IS IMPORTANT TO THEIR COMPANY'S POSITIVE PERFORMANCE.

MUSIC & ENTERTAINMENT

With more than 190 recording studios, over 5,000 working musicians, and live music every night of the week, Nashville is a hub for the music industry. The Nashville region's concentration of musicians and music businesses is the highest in the nation. Music industry activity in Nashville is as much as 30 times greater than the nation overall – 10 times greater than New York or Los Angeles and even greater compared to other cities such as Atlanta, Austin and New Orleans.

Nashville has evolved alongside the music business and has maintained its status as a global center for the entertainment industry. The local music scene has been praised in major publications such as *The New York Times*, *Travel + Leisure*, *SPIN* and *Rolling Stone*.

The Nashville region has been a magnet for creative talent since the 1930s. Today, that energy is stronger than ever and is drawing not only songwriters and instrumentalists from all genres, but also filmmakers, artists, authors and digital entrepreneurs. The Nashville region is home to some of the world's most popular entertainers including Tim McGraw, Jack White, Taylor Swift, Sheryl Crow, The Black Keys, Paramore and Kings of Leon. Nashville's incredibly diverse music and entertainment industry continues to expand making the city a creative core for the region and the country.

LEADING MUSIC & ENTERTAINMENT EMPLOYERS

ACM	Gibson Guitar Corporation
Apple Music	LiveNation
ASCAP	Musicians Hall of Fame & Museum
Big Machine Records	Ryman Hospitality Properties
Billboard	SESAC
BMG/Chrysalis Publishing	Sony Entertainment
BMI	Sony/ATV Music Publishing
Broken Bow	St. Jude Country Cares
CAA	Third Man Records
Capitol Records	Universal Music Group
CMT	Vector Management
Country Music Hall of Fame & Museum	Viacom
Curb Records	Warner Music Nashville
GAC	William Morris

HEADQUARTERED MUSIC & ENTERTAINMENT ASSOCIATIONS

Americana Music Association	Gospel Music Association
Academy of Country Music	International Bluegrass Music Association
Barbershop Harmony Society	National Museum of African American Music
Country Music Association	Nashville Songwriters Association International
Country Radio Broadcasters	

\$15.9 BILLION
TOTAL ANNUAL INDUSTRY IMPACT
WITHIN THE NASHVILLE MSA

\$5.5 BILLION
ANNUAL CONTRIBUTION
TO THE LOCAL ECONOMY

32,000+
DIRECT MUSIC INDUSTRY JOBS
IN THE NASHVILLE REGION

4X MORE
MUSIC INDUSTRY EMPLOYMENT
THAN ANY OTHER CITY IN THE U.S.

"iHeartRadio is excited to be part of the Nashville community! This is such a vital city that has all the elements we are looking for – rapid growth in the tech space, a huge historical connection to music, local colleges and universities that provide a great talent base, and other passionate, tech savvy talent, who continue to flock to this hip and developing market for its quality of life and exciting career opportunities."

**-Darren Davis, President,
iHeartRadio**



MUSIC AND ENTERTAINMENT OCCUPATIONS	JOB IN THE NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Accountants and Auditors	11,680	\$34.90
Agents and Business Managers of Artists, Performers, and Athletes	770	\$39.33
Arts, Design, Entertainment, Sports and Media Occupations	14,490	\$29.20
Audio and Video Equipment Technicians	740	\$26.14
Executive Secretaries and Executive Administrative Assistants	3,040	\$27.55
Financial Managers	5,973	\$59.61
Graphic Designers	1,420	\$25.19
Human Resources Managers	1,700	\$48.12
Musicians and Singers	1,770	\$42.76
Photographers	140	\$19.54
Producers and Directors	1,905	\$33.89
Public Relations Specialists	1,110	\$33.50
Radio and Television Announcers	390	\$22.26
Sound Engineering Technicians	210	\$35.36

*Source: BLS, Occupational Employment Statistics, May 2019 Release,
Chmura Analytics 2019*

ADVANCED MANUFACTURING

Over the past two decades, the Nashville region's premier location, skilled workforce, labor cost advantages, advanced training and innovative technology have made the region an ideal destination for world-class manufacturers. These advantages allow Nashville's celebrated manufacturing base to operate more efficiently and at a lower cost than almost anywhere in America.

Three interstate highways converge in Nashville providing ideal access to market for the manufacturing community. Nashville is a hub in the CSX rail system connecting 20 states, 140 freight carriers and 150 truck terminals. Air cargo at Nashville International Airport (BNA) is supported by 10 major carriers. Rates for freight transport are among the most competitive in the nation.

As a right-to-work state, Tennessee consistently gives employers optimal return on investment. Favorable business regulatory and tax climates allow manufacturing firms to focus on high-quality production. The community college system of vocational/technical schools provides the workforce that helped Nashville earn a national reputation as a top location for advanced manufacturing operations.

LEADING ADVANCED MANUFACTURING EMPLOYERS

LOCAL EMPLOYEES

Nissan North America	12,000
Electrolux Home Products North America	3,400
Bridgestone Americas Inc.	3,335
A.O. Smith Corp.	2,254
Dell	1,750
Tyson Foods Inc	1,600
Schneider Electric	1,416
Hankook Tire America Corp.	1,200
Trane Co.	1,100
General Mills Inc.	1,028
ABC Technologies	1,000
Adient	1,000
Mars Petcare US	1,000
UniPres USA Inc.	913
Carlex Glass America	775
Vi-Jon	728
Tennsco	576
Triumph Aerospace Structures	560
Nashville Wire Products Manufacturing Co.	556
Akebono Brake	500
Mahle Filter Systems North America	491
North American Stamping Group	410
Josten's Printing and Publishing Division	400
Bridgestone Metalpha	375
YAPP USA Automotive Systems Inc.	375

Source: Book of Lists 2019

ADVANCED MANUFACTURING OCCUPATION	JOB IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Construction laborers	6,120	\$16.56
Drafters, all other	140	\$25.84
Industrial engineers	1,470	\$41.21
Mechanical engineers	1,010	\$44.44
Operating engineers and other construction equipment operators	2,850	\$19.04
Painters, construction and maintenance	1,060	\$17.96
Paving, surfacing, and tamping equipment operators	190	\$17.45

86,425 MANUFACTURING JOBS IN THE NASHVILLE REGION



22,472 NEW JOBS IN THE NASHVILLE REGION'S MANUFACTURING SECTOR SINCE 2010



#2 BEST PLACE FOR NEW BUSINESSES (SMARTADVISOR 2019)



#2 STATE FOR DOING BUSINESS



Source: BLS, Occupational Employment Statistics, May 2019
Release, Chmura Analytics 2019



"Bridgestone Americas is proud to call Nashville home for the past 28 years. Music City's creative spirit and energy make it a great place to live, work and play for our Bridgestone teammates and their families and we're honored to remain an integral part of Nashville's continued success."

**Paolo Ferrari, CEO & president,
Bridgestone Americas**

DISTRIBUTION & TRADE

The Nashville region is centrally located and offers expansive modes of transportation allowing businesses to reach U.S. and international locations with ease and affordability.

Fifty percent of the U.S. population lives within 650 miles of Nashville, and 24 states are located within that 650-mile radius. Tennessee borders eight states. These location advantages translate to one- and two-day truck delivery times to more than 75 percent of all U.S. markets.

Nashville is one of only six U.S. cities with three major intersecting interstate highways. Highway systems in Tennessee are rated among the nation's best offering exceptional connections for freight and commuting. Middle Tennessee is within 250 miles of one-third of all car and truck assembly in the United States offering an ideal location for vehicle shipment. Unmatched access to North American markets delivers bottom-line advantage in freight costs.

82,000+
**DISTRIBUTION &
TRADE JOBS**
IN THE NASHVILLE REGION
- EMSI, 2019

1-2 DAY
TRUCK DELIVERY TIMES
TO MORE THAN
75% OF ALL
U.S. MARKETS

ONE-THIRD
OF ALL CAR AND TRUCK ASSEMBLY
IN THE UNITED STATES IS WITHIN
250 MILES OF NASHVILLE



LEADING DISTRIBUTION/ TRADE EMPLOYEES	LOCAL EMPLOYEES
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Nissan North America	12,000
Amazon.com	3,692
Electrolux Home Products	3,400
Bridgestone Americas	3,335
A.O. Smith Corp.	2,254
Ingram Content Group Inc.	1,957
GEODIS	1,773

Source: Book of Lists 2019

DISTRIBUTION AND TRADE OCCUPATION	JOBS IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
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Air traffic controllers	79	\$56.44
Airfield operations specialists	60	\$15.89
Cargo and freight agents	300	\$20.21
Commercial pilots	175	\$28.22
Conveyor operators and tenders	30	\$19.38
Gas Compressor and Gas Pumping Station Operators	50	\$21.16
Heavy and tractor-trailer truck drivers	18,840	\$23.19
Light Truck Drivers	6,430	\$17.29
Motor vehicle operators	540	\$15.08
Tank car, truck, and ship loaders	57	\$21.82
Transportation security screeners	300	\$18.35
Transportation workers, all other	225	\$17.74

Source: BLS, Occupational Employment Statistics, May 2019 Release, Cbmura Analytics 2019





LIVABILITY

QUALITY OF LIFE

Living and working in the Nashville MSA has many advantages that appeal to companies and workers considering relocation. Nashvillians enjoy a higher standard of living than workers in other large metros. The region has a relatively low cost of living and high per capita income, resulting in more disposable income for its residents. Nashville routinely places at the top of national

and international livability rankings. Nashville has a vibrant culture centered on creativity, music and entrepreneurship that complements its robust dining scene, popular entertainment venues and beautiful outdoor spaces.

CREATIVE VITALITY

THE NASHVILLE MSA IS HOME TO MORE THAN 630 ARTS, CULTURE AND HUMANITIES DESTINATIONS



**PLATINUM-LEVEL CERTIFIED
VALLEY SUSTAINABLE COMMUNITY**



**\$15.9 BILLION
MUSIC INDUSTRY IMPACT**



"To build a successful expansion team in major league sports you need a number of raw ingredients: committed investors, a vibrant business sector and an engaged community with energy and civic pride. Nashville has proven to be the perfect choice for Nashville Soccer Club, bringing together the public and private sectors to deliver a rounded solution that can appeal and deliver for the entire community."

**- Ian Ayre, Chief Executive Officer,
Nashville SC**



180+
ARTS-RELATED NON-PROFITS



425
DOWNTOWN RESTAURANTS, BARS
AND NIGHTLIFE ENTERTAINMENT OPTIONS



13,000
RESIDENTS LIVE DOWNTOWN



2,400+
BUSINESSES OPERATE
IN DOWNTOWN NASHVILLE



75,000
PEOPLE WORK IN THE DOWNTOWN CORE

Source: Downtown Partnership 2019 Annual Report

MUSEUMS AND FESTIVALS

- Adventure Science Center
- African Street Festival
- Americana Music Festival
- Bonnaroo Music and Arts Festival
- CMA Music Festival
- Cheekwood Botanical Gardens & Museum of Art
- Cherry Blossom Festival
- Country Music Hall of Fame & Museum
- Frist Center for the Visual Arts
- Glen Campbell Museum
- Jefferson Street Jazz and Blues Festival
- Johnny Cash Museum
- Lane Motor Museum
- Live on the Green Music Festival
- Madame Tussauds Nashville
- Musicians Hall of Fame and Museum
- Nashville Fashion Week
- Nashville Film Festival
- Nashville Oktoberfest
- Nashville Pride
- National Museum of African American Music
- Pilgrimage Music & Cultural Festival
- Tennessee Craft Fair
- Tennessee State Museum
- The Patsy Cline Museum
- The Parthenon



**Nashville
Predators**

NHL



**Tennessee
Titans**

NFL



**Nashville
Sounds**

MLB



**Nashville Zoo
at Grassmere**



**Nashville
Soccer Club**

MLS



56
GOLF COURSES



80 MILES
OF PAVED TRAILS



200+
PUBLIC PARKS



30,000 ACRES
OF INLAND LAKE





LIVE MUSIC
EVERY DAY OF THE WEEK



MORE THAN 120
LIVE PERFORMANCE VENUES

VENUE HIGHLIGHTS

- 3rd and Lindsley
- Ascend Amphitheater
- Bridgestone Arena
- Cannery Ballroom
- Grand Ole Opry
- Marathon Music Works
- Nashville Ballet
- Nashville Children's Theatre
- Nashville Opera
- Nissan Stadium
- Ryman Auditorium
- Schermerhorn Symphony Center
- Tennessee Performing Arts Center
- The Bluebird Cafe
- The Station Inn

DIVERSITY

Nashville's population continues to expand in diversity of origin, ancestry and ethnicity, enhancing the region as a cosmopolitan place to live and work.

INTERNATIONAL MIGRATION ACCOUNTED FOR
MORE THAN 20 PERCENT OF NASHVILLE'S NET
IN-MIGRATION FROM 2010 TO 2019.



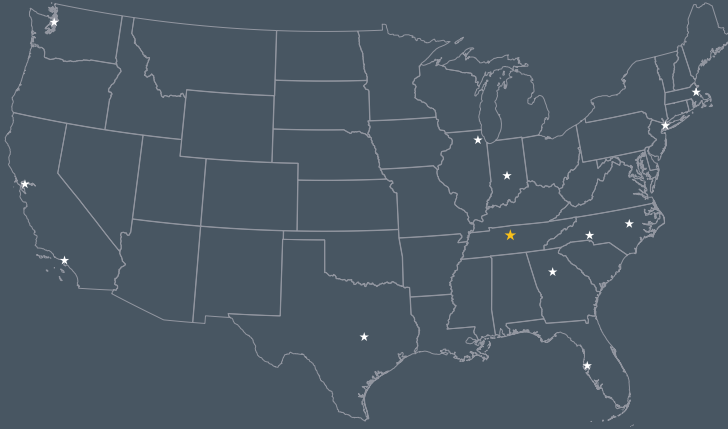
1 IN 8 DAVIDSON COUNTY RESIDENTS
IS FOREIGN-BORN



NASHVILLE AND MIDDLE TENNESSEE OFFER A WIDE VARIETY OF
INTERNATIONAL CULTURAL AND SOCIAL ORGANIZATIONS.

NASHVILLE IS **HOME TO LARGE POPULATIONS OF**
HISPANIC, MIDDLE EASTERN, KURDISH AND SOUTH AND SOUTHEAST ASIAN.

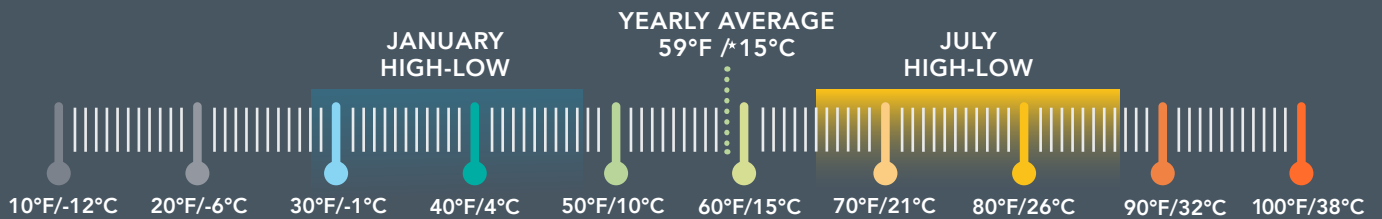
COST OF LIVING



Source: C2ER Cost of Living 2019 Annual Averages

New York	237.4
San Francisco	196.6
Seattle	156.7
Boston	150.1
Los Angeles	145.9
Chicago	120.0
Atlanta	102.4
Austin	99.3
Nashville	98.5
Charlotte	97.9
Raleigh	95.1
Indianapolis	92.1
Tampa	90.9

CLIMATE AND SETTING



DAYS OF SUNSHINE PER YEAR

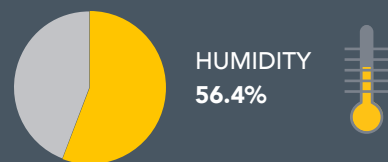


ELEVATION

TENNESSEE
900 ft. / 274.32m

NASHVILLE
500 ft. / 167.6m

AVERAGE RELATIVE HUMIDITY



AVERAGE ANNUAL RAINFALL

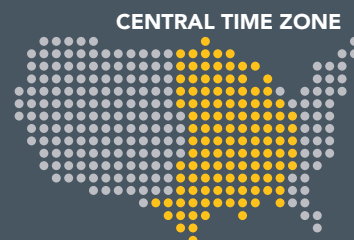
Nashville: 47.2 inches (122 cm)

Tennessee: 54.2 inches (137 cm)

United States: 63.7 inches (160 cm)



TIME ZONE



Source: ACCRA Cost of Living 2018 annual data



CONTACT US

The Nashville Area Chamber of Commerce's top-ranked economic development team is dedicated to assisting you with your business relocation or expansion across the 10-county Nashville region. We serve as a single point of contact to make your transition into the Nashville region as smooth as possible. Our services include:

- Providing regional research and data
- Assisting with comprehensive real estate searches
- Coordinating with all regional economic development partners including State of Tennessee, Tennessee Valley Authority and local entities
- Facilitating company and site consultant visits to the region
- Creating customized talent recruitment plans
- Assisting with employee and family relocation process

For more information or assistance with your site selection process, please contact Jeff Hite at 615-207-2584 or jhite@nashvillechamber.com.



nashvillechamber.com

