



NASHVILLE

REGIONAL ECONOMIC DEVELOPMENT GUIDE

TABLE OF CONTENTS

Location	4 - 6
Economy	7 - 9
Accessibility & Transportation	10 - 11
International Business	12 - 15
Demographics	16 - 17
Talent & Workforce	18 - 25
Target Industries	26 - 27
Corporate Services	28 - 29
Health Care Management	30 - 32
Information Technology	33 - 35
Music & Entertainment	36 - 37
Advanced Manufacturing	38 - 39
Distribution & Trade	40 - 41
Livability	42 - 46
Contact Us	47



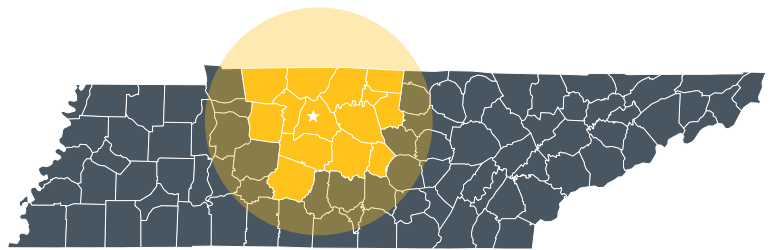
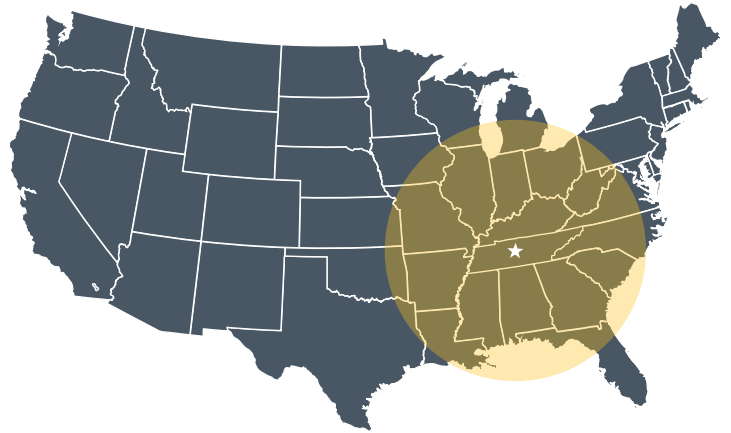


LOCATION

NASHVILLE

Strategically located in the heart of the Tennessee Valley, the Nashville region is where businesses thrive and the creative spirit resonates across industries and communities. The Nashville economic market has 10 counties and a population of more than 1.9 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, Dollar General, HCA Healthcare, AllianceBernstein, and Amazon.

A national hub for the creative class, Nashville has the largest concentration of the music industry per capita in America. The Nashville region's educated workforce not only provides an abundant talent pool for companies, but 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 Nashville's economic market among the nation's best locations for relocating, expanding and startup companies.



POPULATION GROWTH & TOP EMPLOYERS

NASHVILLE ECONOMIC MARKET

2012: 1,824,012
2017: 1,971,542

+10.2%

TENNESSEE

2012: 6,456,243
2017: 6,715,984

+4.0%



CHEATHAM

2013: 39,340
2018: 40,439

+2.8%

TOP EMPLOYERS

A.O. Smith
Arcosa Marine
Caymas Boats



DAVIDSON

2013: 660,456
2018: 692,587

+4.9%

TOP EMPLOYERS

Vanderbilt University Medical Center
HCA Healthcare
St Thomas Health/Ascension



DICKSON

2013: 50,132
2018: 53,446

+6.6%

TOP EMPLOYERS

Tennsco Corporation
Nemak
Conagra Foods



MAURY

2013: 83,582
2018: 94,340

+12.9%

TOP EMPLOYERS

GM Spring Hill Manufacturing
Maury Regional Medical Center
Tennessee Farm Bureau



MONTGOMERY

2013: 184,176
2018: 205,950

+11.8%

TOP EMPLOYERS

Trane Company
Agero
Convergys



ROBERTSON

2013: 67,245
2018: 71,012

+5.2%

TOP EMPLOYERS

Electrolux Home Products
Macy's Logistics
Hollingsworth Oil Co.

The Nashville MSA has experienced job growth of **26 percent** over the past decade, making our region the **second fastest growing metro economy in the country** since the Great Recession.



RUTHERFORD

2012: 281,062
2017: 324,890

+15.7%

TOP EMPLOYERS

Nissan North America
National HealthCare Corp.
Middle Tennessee State University



SUMNER

2012: 168,698
2017: 187,149

+10.7%

TOP EMPLOYERS

Sumner Regional Medical Center
UniPress USA Inc.
Xtend Healthcare



WILLIAMSON

2012: 199,111
2017: 231,729

+17.2%

TOP EMPLOYERS

Community Health Systems Inc.
HCA Healthcare Inc.
United Healthcare



WILSON

2012: 121,969
2017: 140,625

+14.7%

TOP EMPLOYERS

Amazon
Cracker Barrel Old Country Store Inc.
CEVA Logistics

Sources: US Census 2018; 2019 Book of Lists

U.S. POPULATION AROUND NASHVILLE

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

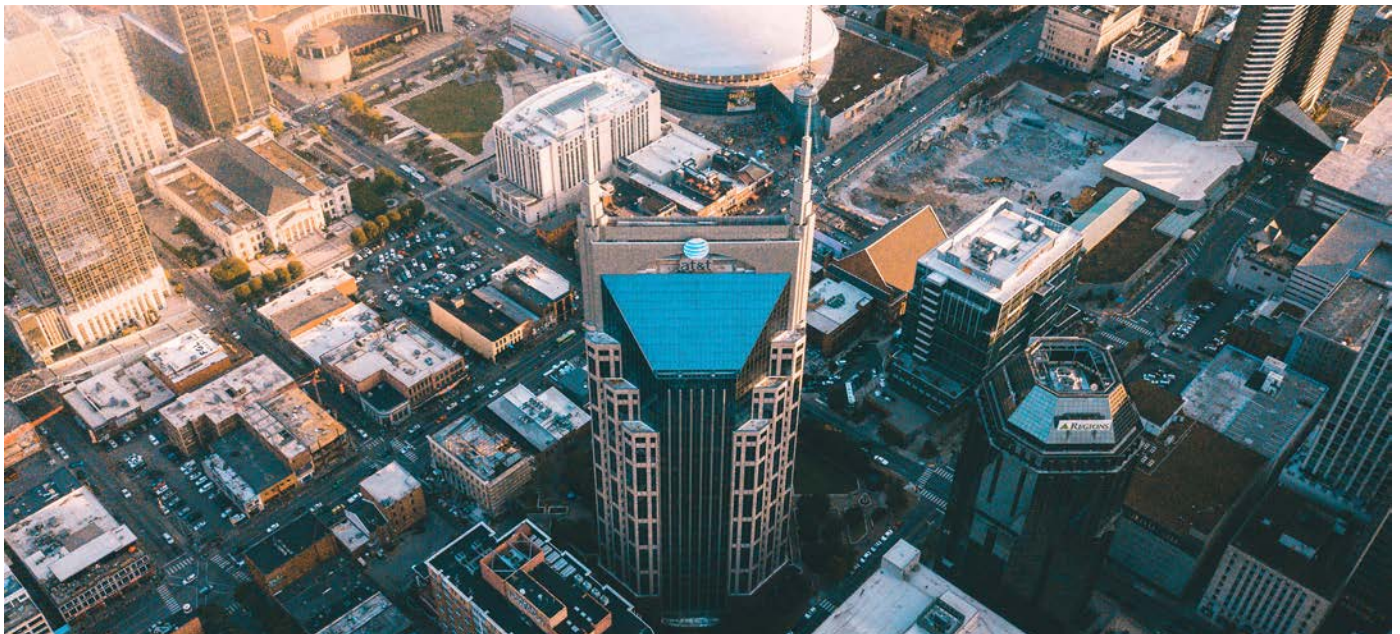
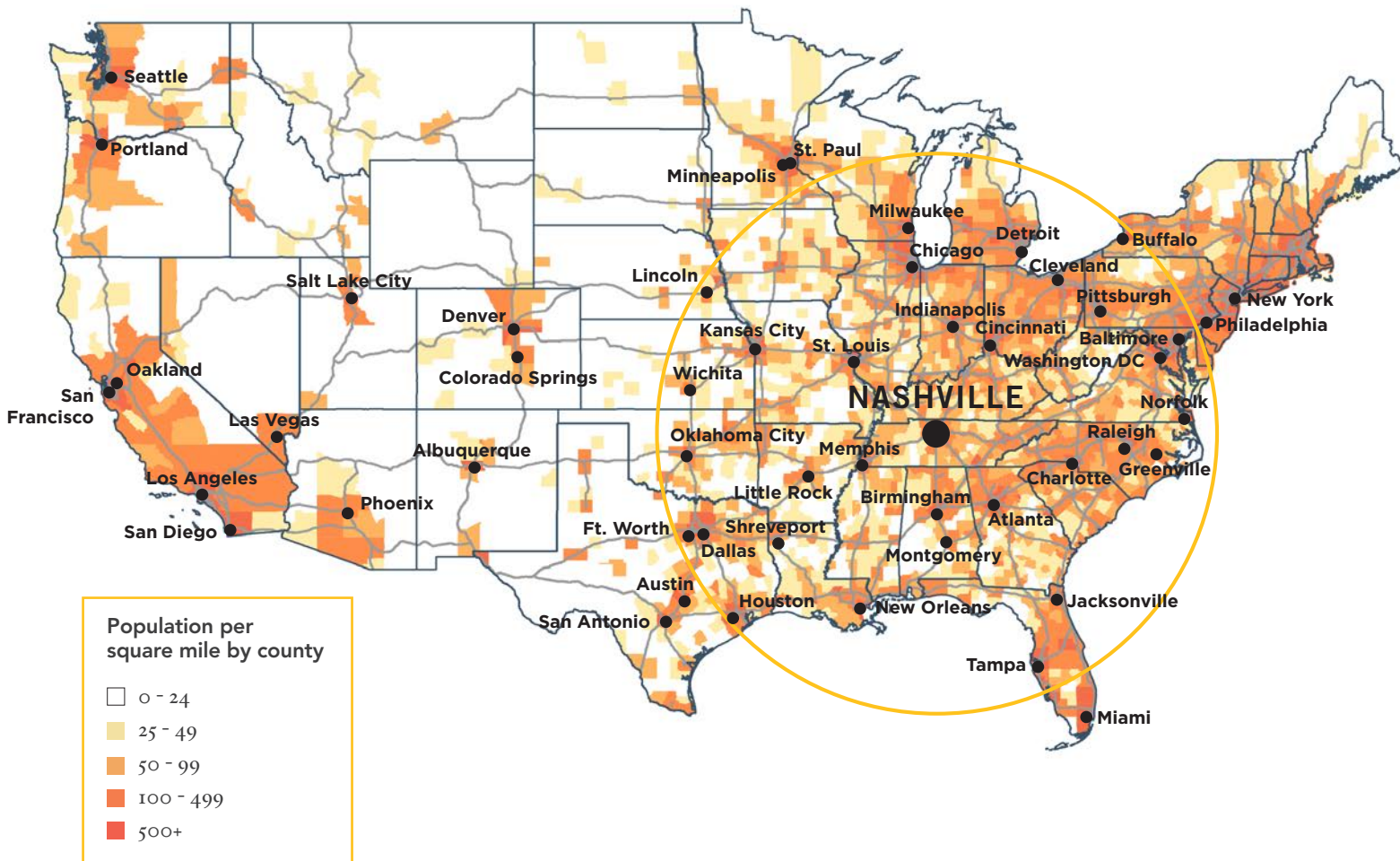


Photo courtesy of Jake Matthews



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, 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 six 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

273,000
JOBS

\$46.7 BILLION
ANNUAL ECONOMIC IMPACT

MUSIC & ENTERTAINMENT

60,000
JOBS

\$10 BILLION
ANNUAL ECONOMIC IMPACT

MANUFACTURING

84,300
JOBS

\$9.5 BILLION
ANNUAL ECONOMIC IMPACT

TOURISM & HOSPITALITY

103,400
JOBS

\$5.7 BILLION
ANNUAL ECONOMIC IMPACT

Sources: Healthcare Council Economic Impact Study, September 2018; Nashville Area Chamber of Commerce Music Industry Study; Bureau of Labor Statistics, QCEW 2018A



- Management, information, administration, professional and technical services (**8,286**)
- Retail trade (**6,096**)
- Finance and insurance (**3,159**)
- Real Estate, rental and leasing (**2,017**)
- Health care and social assistance (**4,717**)
- Accommodation and food services (**4,055**)
- Transportation, warehousing and wholesale trade (**3,306**)
- Construction (**3,290**)
- Education, arts, entertainment and recreation (**1,866**)
- Manufacturing (**1,503**)
- Miscellaneous services (**4,444**)

U.S. Census Bureau Geography Area Series: County Business Patterns, 2016 Business Patterns

TOP REGIONAL EMPLOYERS

**National, regional or division headquarters*

LOCAL EMPLOYEES

Vanderbilt University Medical Center* & Monroe Carrell Jr. Children's Hospital at Vanderbilt	23,627
Nissan North America*	10,750
HCA Healthcare Inc.*	10,613
Saint Thomas Health*	6,100
Vanderbilt University*	5,695
Community Health Systems Inc.*	4,700
Randstad	4,557
Asurion*	3,750
Bridgestone Americas Inc.*	3,539
The Kroger Co.	3,523
National Healthcare Corp.	3,250
Electrolux Home Products North America	3,200
Amazon	3,094
Cracker Barrel Old Country Store Inc.*	3,085
Shoney's*	3,000
Lowe's Cos. Inc.	2,890
Walgreens	2,716
Dollar General Corp.*	2,585
Gaylord Opryland Resort & Convention Center*	2,500
A.O. Smith Corp.	2,456
AT&T Inc.	2,250
Middle Tennessee State University	2,175
UnitedHealthcare	1,984
Ingram Content Group Inc.	1,842
State Farm Insurance Cos.	1,650

Source: Fortune 2018

FORTUNE 500 / 1000 COMPANIES

HEADQUARTERED IN THE NASHVILLE REGION 2019 RANKING

HCA	63
Dollar General	123
Community Health Systems	160
Envision Healthcare	198
Delek US Holdings	384
LifePoint Health	390
Tractor Supply	391
Brookdale Senior Living	543
Cracker Barrel Old Country Store	742
Genesco	747
Acadia Healthcare	754
Louisiana-Pacific	787
Quorum Health	937

Source: Fortune 2018

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 (2.75% local option)
Right-to-work state	Yes
State labor force	3,243,944
Regional labor force	1,129,909
Cost of doing business	#121/200
CNBC state business friendliness ranking	8
CEO magazine business climate ranking	6
State and local per capita tax burden ranking	49
Cost-of-living index	98.8
Average Class A office lease rate	\$32.00
Average marketwide office lease rate	\$26.86
Average lease rate - industrial	\$4.71

COUNTY PROPERTY TAX RATES*

Cheatham	\$2.92740
Davidson	General Services District - \$2.755000 Urban Service District - \$3.15500
Dickson	\$2.70000
Maury	\$2.23640
Montgomery	\$3.07000
Robertson	\$2.57590
Rutherford	\$2.09940
Sumner	\$2.50000
Williamson	\$2.15000
Wilson	\$2.51889

*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:

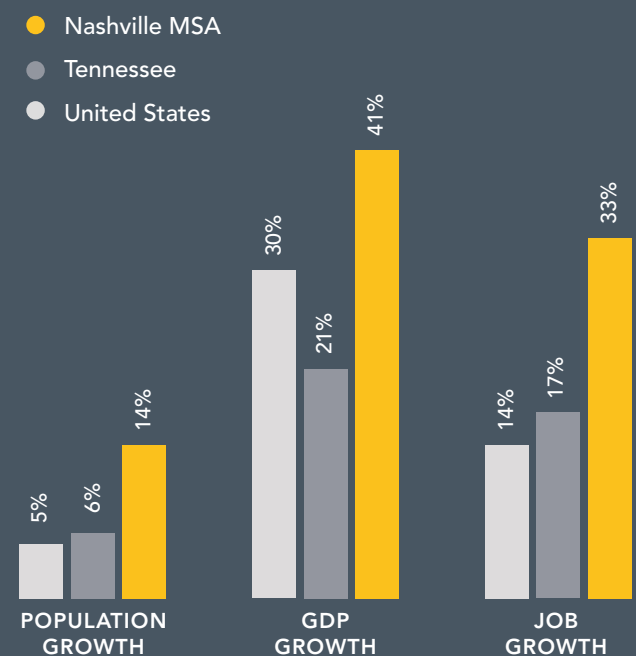
Residential and Farm Real Property = 25%
Commercial and Industrial Real Property = 40%
Commercial and Industrial Personal Property = 30%

UNPRECEDENTED GROWTH

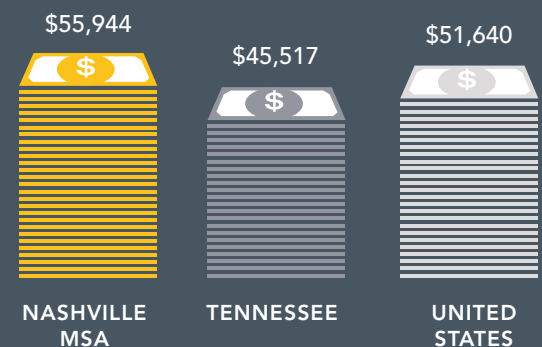
UNEMPLOYMENT RATE (2018)



KEY ECONOMIC INDICATORS (2010 - 2017)



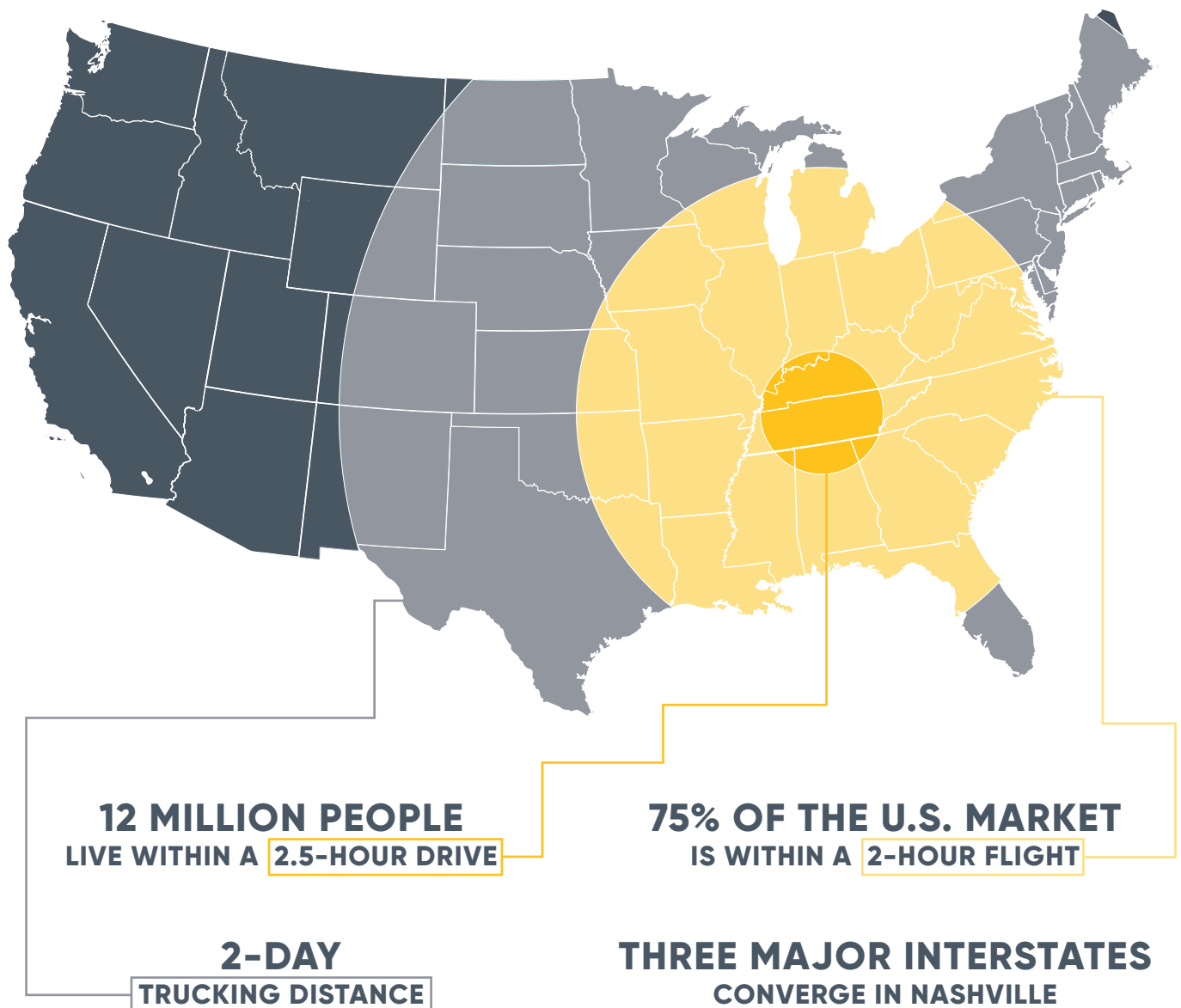
PER CAPITA INCOME (2017)



Sources: Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2018 (2018 Population Estimates); BEA, Real GDP in Chained Dollars; BEA Current Employment Statistics; C2ER ACCRA Cost of Living Index; TN & Nashville MSA Economy at a Glance BLS; 2019 Forbes

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 companies to reach U.S. and international locations with ease and affordability. Tennessee shares a border with eight different 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 16 million passengers annually.

15 carriers, averages 460 daily flights to more than 65 nonstop markets and provides service to more than 14.9 million passengers annually.

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



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.



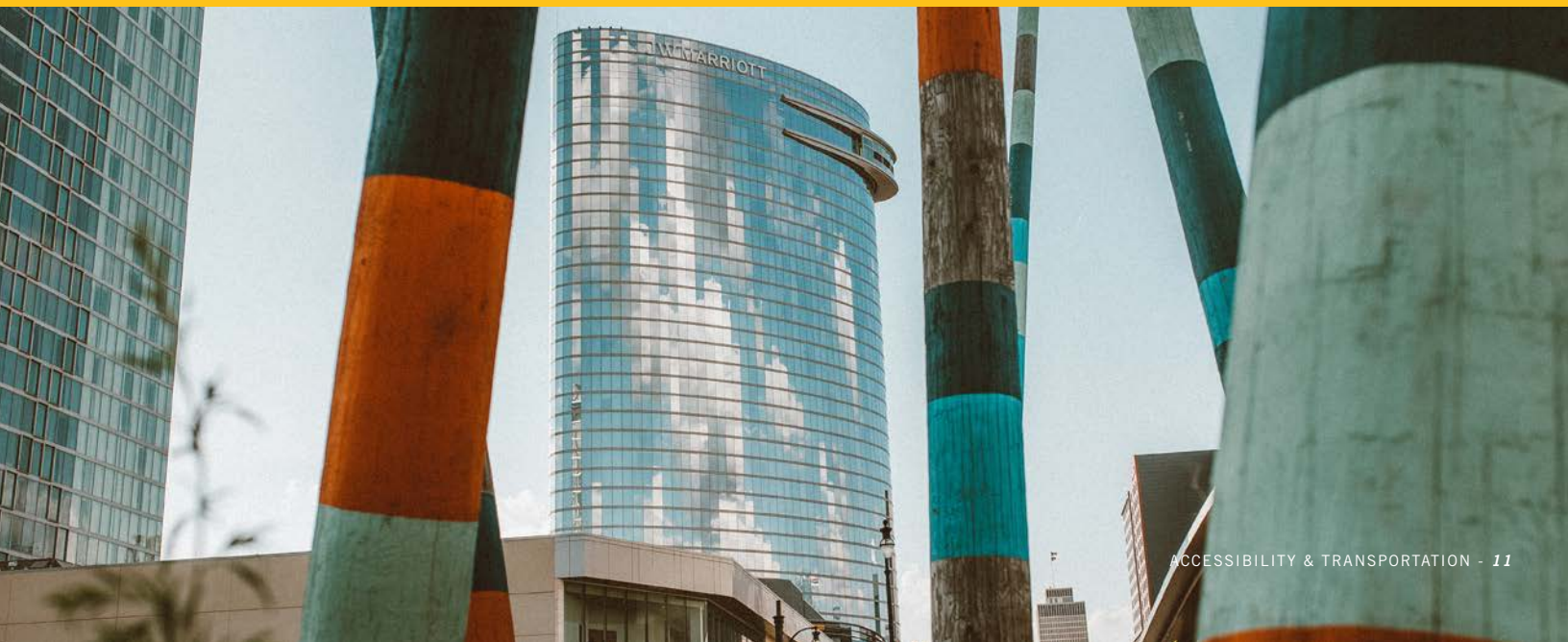
TRANSIT

WeGo intercity bus system

Music City Star suburban rail

Nashville B-cycle bike-share system

Rideshare services



INTERNATIONAL BUSINESS

The Nashville economic market is one of America's most dynamic centers for business growth, with expanding global links and opportunities. With international businesses and headquarters spanning all business sectors, including corporate services, health care, advanced manufacturing, supply chain management, it is easy to see the diversity present in every aspect of Music City. No city of similar size offers as great a setting and potential for international trade and investment.



45%
OF THE NASHVILLE
REGION'S NEW JOB
COMMITMENTS
IN FY 2018 WERE
CREATED THROUGH
FOREIGN DIRECT
INVESTMENT.

THE CONSULATE GENERAL
OF JAPAN MOVED TO
NASHVILLE FROM NEW
ORLEANS IN 2008 TO
BETTER SERVICE THE
GROWING POPULATION
OF JAPANESE NATIONALS
IN THE MIDSOUTH.

10,000+ PEOPLE
MOVE TO NASHVILLE FROM
ABROAD EVERY YEAR,
ACCOUNTING FOR
11.5%
OF ALL INBOUND
MIGRATION.

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 10,750 people in the Nashville region.

OVER 330
FOREIGN OWNED
COMPANY
LOCATIONS EMPLOY
MORE THAN
49,000 PEOPLE
IN OUR REGION.

NASHVILLE'S SISTER CITIES

- ★ Belfast North, 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	% OF EMPLOYEES
Japan	69	17,659	35.8%
United Kingdom	39	3,532	7.2%
Germany	28	3,630	7.4%
France	27	2,550	5.2%
Canada	26	2,948	6.0%
Switzerland	18	2,706	5.5%
Ireland	9	1,561	3.2%
All others	111	14,801	30.0%

IN 2018
POPULATION GAINS
FROM ABROAD
ACCOUNTED FOR
23% OF ALL
NET MIGRATION.

TENNESSEE HAS
RANKED IN THE
TOP 10 NATIONALLY
FOR NEW FDI JOB
COMMITMENTS
SINCE 2013,
RISING TO #1
IN 2013 AND 2015.
(IBM GLOBAL LOCATION
TRENDS REPORT, 2017).

SME'S
ACCOUNT FOR
82%
OF NASHVILLE
GOODS EXPORTERS.
(2017)

NASHVILLE MSA EXPORT PRODUCTS

EXPORTS

Transportation Equipment Manufacturing	\$4,087,859,000
Computer and Electronic Product Manufacturing	\$2,504,304,000
Electrical Equipment, Appliance and Component Manufacturing	\$563,683,000
Chemical Manufacturing	\$521,041,000
Machinery Manufacturing	\$481,921,000
All Others	\$2,005,465,000
Total	\$10,164,273,000

TRADING PARTNERS

EXPORTS

Canada	\$4,251,747,000
Mexico	\$1,486,943,000
Japan	\$590,577,000
China	\$539,214,000
Hong Kong	\$336,878,000
All Other	\$2,958,914,000
Total	\$10,164,273,000

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



"Our relocation fifteen years ago to Nashville has been a huge factor in the level of success we have realized for Mitsui and its people. A lower cost of living, a higher quality of life, abounding hospitality, and countless opportunities all come together in the Nashville area as an extraordinary place to grow your business and raise your family, too."

-Mike Fedele, general manager, regional officer
Mitsui & Co. (U.S.A.), Inc., Nashville

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.

AKZO NOBEL
NETHERLANDS

PRATT INDUSTRIES USA
AUSTRALIA

ELECTROLUX
HOME PRODUCTS
SWEDEN

EMBRAER
BRAZIL

CARLEX GLASS
AMERICA, LLC

DAIEI AMERICA

IB-TECH

KYOWA AMERICA

NHK SEATING OF AMERICA
JAPAN

MAPLEHURST
BAKERIES
CANADA

KHS AMERICA
TAIWAN

MOBILE MENTOR
NEW ZEALAND

FLORIM, USA
ITALY

CINRAM

SITEL
CANADA

2000

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
FRANCE

MEDACTA

UBS
SWITZERLAND

MARTINELLI ETTORE

BERETTA

UST
ITALY

TRIANGLE TIRE

SINOMAX USA

AMERICAN WONDER
PORCELAIN
CHINA

HANKOOK TIRE

LG ELECTRONICS

ATLASBX
SOUTH KOREA

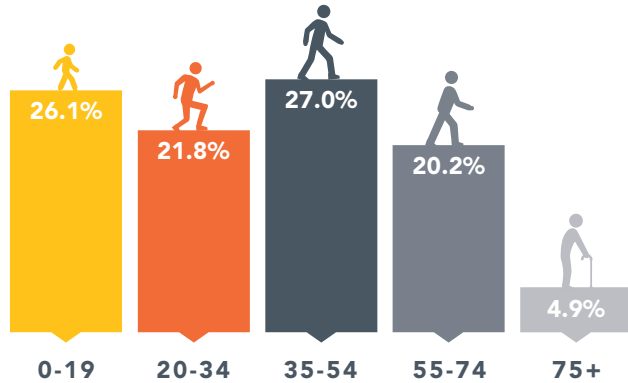
PHILIPS
NETHERLANDS

DEMOGRAPHICS

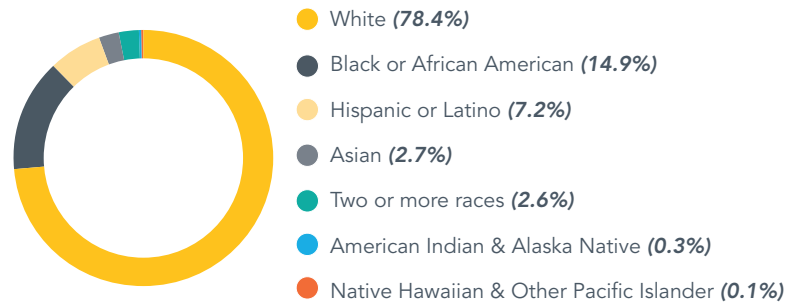
NASHVILLE MSA

Source: US Census, ACS 2017 1 Year Estimates

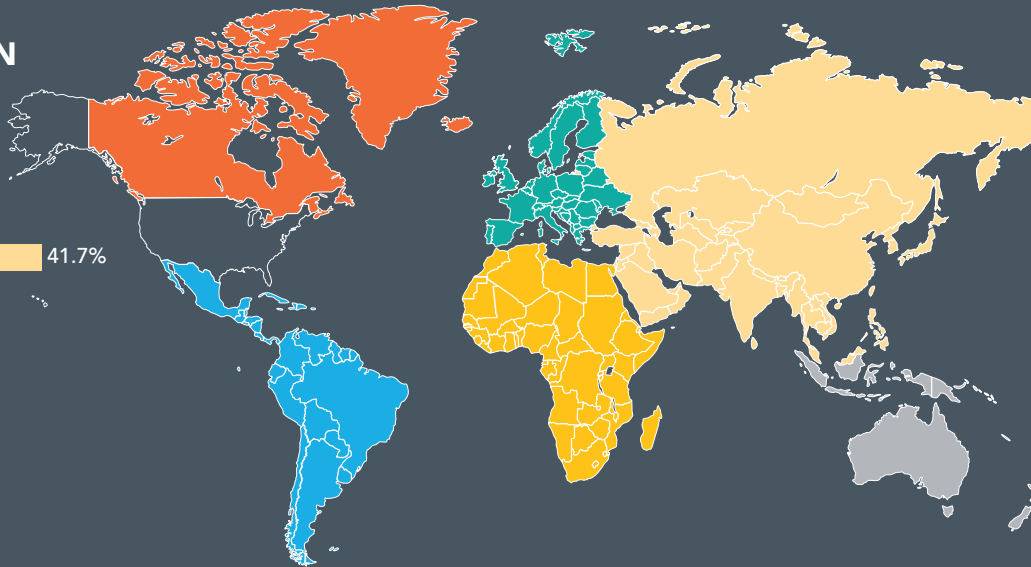
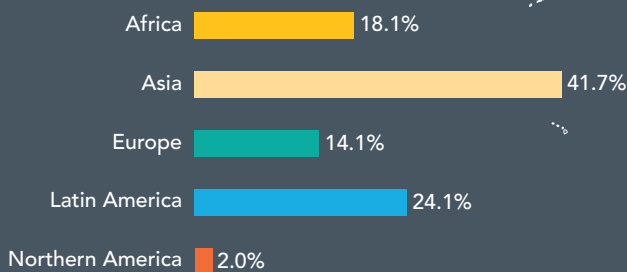
AGE



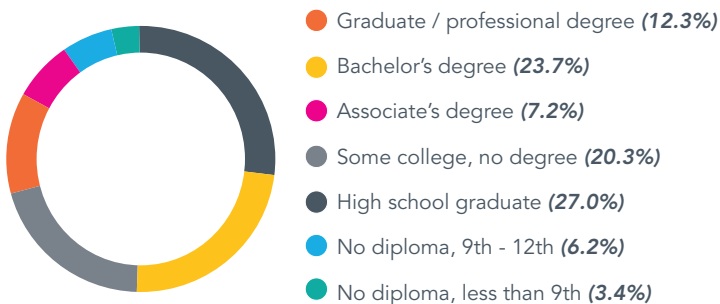
RACE/ETHNICITY



FOREIGN-BORN POPULATION BY WORLD REGION OF BIRTH



EDUCATIONAL ATTAINMENT AGE 25 YEARS AND OLDER



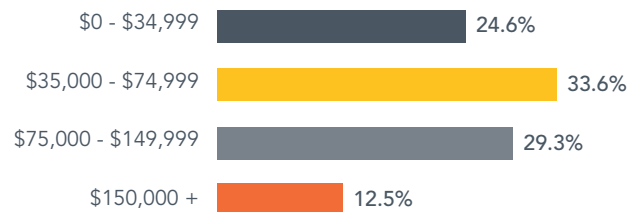
HOUSEHOLD INCOME & SIZE



Average household
size: **2.60 people**



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



Source: US Census, ACS 2017 1 Year Estimates



NASHVILLE MSA TOTAL POPULATION: 1,905,898



THE NASHVILLE REGION GAINED 83 NET NEW PEOPLE PER DAY ON AVERAGE IN 2017



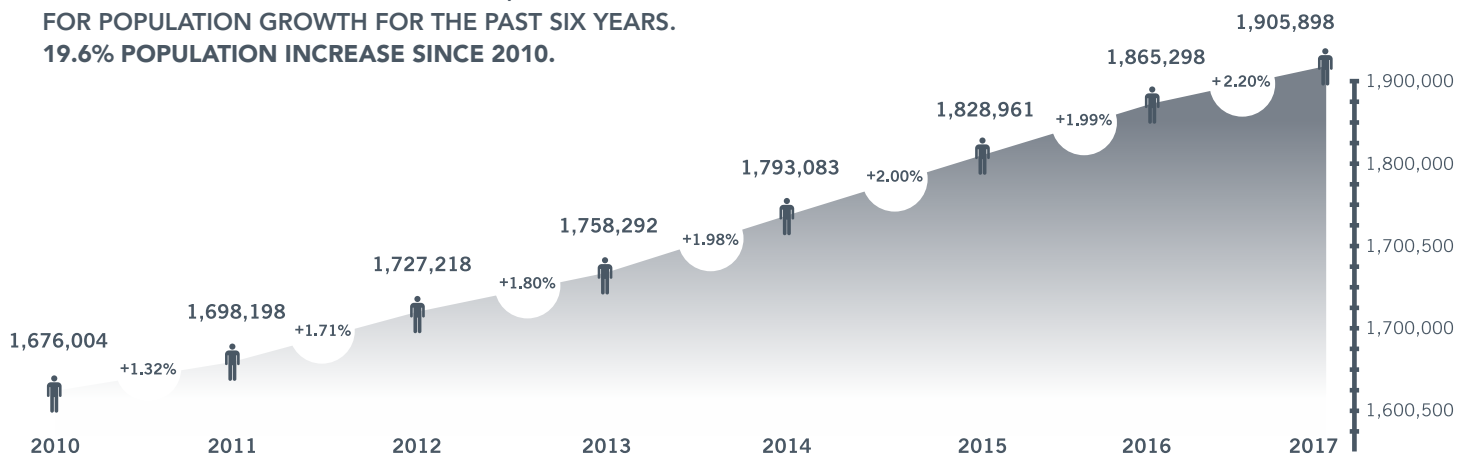
IN THE NASHVILLE REGION, MORE THAN 312,848 RESIDENTS WERE ADDED FROM 2010 TO 2018.



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.
19.6% POPULATION INCREASE SINCE 2010.



Sources: US Census, ACS 2017 1 Year Estimates; Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2018; Boyd Center for Business and Economic Research, University of Tennessee, Knoxville - September 2017

TALENT & WORKFORCE

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. Nearly 123,000 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 six percent of residents over age 25 have a bachelor's degree or higher, and more than 158,000 residents have



"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

1,905,898

**TOTAL
POPULATION**

1,042,993

**TOTAL
LABOR FORCE**

68.9%


**LABOR
PARTICIPATION
RATE**

LABOR FORCE BY SECTOR

Goods-producing	7.27%
Service-providing	52.05%
Information	1.35%
Financial activities	3.89%
Professional and business services	10.04%
Educational and health services	9.03%
Leisure and hospitality	6.75%
Other services	2.58%
Government	7.04%

Sources: Nash MSA Economy at a Glance BLS 2018; Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2018; Employment Status, ACS 2017 Survey 1-Year Estimates





INDUSTRY SECTOR JOBS AND WAGE RATES	NASHVILLE JOBS	NASHVILLE MEDIAN SALARY	U.S. JOBS	U.S. MEDIAN SALARY
Accommodation and food services	105,793	\$25,424	14,593,936	\$24,466
Administrative support, waste management services	89,915	\$41,582	11,198,483	\$42,699
Agriculture, forestry, fishing and hunting	11,671	\$23,891	2,905,834	\$34,581
Arts, entertainment and recreation	38,050	\$51,804	4,019,300	\$33,398
Construction	58,791	\$60,912	8,986,639	\$63,838
Educational services	27,329	\$55,549	3,661,361	\$50,922
Finance and insurance	67,810	\$92,299	10,136,675	\$96,181
Government	111,825	\$72,504	21,548,140	\$82,006
Health care and social assistance	132,422	\$70,663	21,440,540	\$58,804
Information	25,813	\$82,244	3,273,332	\$116,348
Management of companies and enterprises	24,699	\$140,994	2,755,821	\$129,944
Manufacturing	86,849	\$76,036	13,245,386	\$82,741
Other services (except public administration)	49,831	\$33,397	7,560,406	\$33,632
Professional, scientific, and technical services	86,450	\$84,943	12,646,294	\$88,815
Real estate and rental and leasing	58,529	\$47,185	8,849,042	\$37,759
Regional trade	120,506	\$37,470	18,469,343	\$35,300
Transportation and warehousing	63,451	\$47,854	7,390,736	\$51,094
Utilities	1,513	\$106,699	667,609	\$128,999
Wholesale trade	41,204	\$87,353	6,275,964	\$86,911

Source: EMSI, 2018

THE TALENT PIPELINE

NEARLY 123,000
STUDENTS ATTEND THE AREA'S
COLLEGES AND UNIVERSITIES.

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

25,500 DEGREES AND CERTIFICATES AWARDED
TO GRADUATES OF NASHVILLE-AREA
COLLEGES AND UNIVERSITIES IN 2017.

ENROLLMENT IN HIGHER EDUCATION

ACCREDITED 4 YEAR AND POSTGRAD	LOCATION	ENROLLED 2017
Middle Tennessee State University	Murfreesboro	21,913
Vanderbilt University	Nashville	12,592
Tennessee Technological University	Cookeville	10,504
Austin Peay State University	Clarksville	10,463
Tennessee State University	Nashville	8,177
Belmont University	Nashville	8,012
Bethel University	McKenzie	5,779
Lipscomb University	Nashville	4,642
Trevecca Nazarene University	Nashville	3,620
Cumberland University	Lebanon	2,314
University of the South	Sewanee	1,778
Meharry Medical College	Nashville	826
Fisk University	Nashville	701
ACCREDITED 2 YEAR INSTITUTIONS AND TECH SCHOOLS		
Nashville State Community College	Nashville	8,197
Volunteer State Community College	Gallatin	8,838
Motlow State Community College	Lynchburg	6,594
Columbia State Community College	Columbia	5,938
Tennessee College of Applied Technology	Nashville	806
Tennessee College of Applied Technology	Dickson	582
Tennessee College of Applied Technology	Murfreesboro	491
Total		122,767

Source: National Center for Education Statistics, 2017

EDUCATIONAL AWARDS BY CATEGORY, NASHVILLE MSA

PROGRAMS AND OCCUPATIONS	2017 AWARDS
Health professions and related programs	5,311
Business, management, marketing and related support services	3,206
Liberal arts and sciences, general studies and humanities	2,884
Education	1,552
Visual and performing arts	1,417
Mechanic and repair technologies/technicians	1,241
Social sciences	997
Multi/Interdisciplinary studies	753
Personal and culinary services	738
Psychology	719
Biological and biomedical sciences	681
Engineering	560
Communication, journalism, and related programs	517
Protective services	513
Computer and information sciences and support services	477
Parks, recreation, leisure and fitness studies	453
Legal professions and studies	389
Public administration and social service professions	308
Family and consumer sciences/human sciences	299
Engineering technologies and engineering-related fields	279
English language and literature/letters	253
Transportation and materials moving	250
Theology and religious vocations	231
Physical sciences	229
Communications technologies/technicians and support services	221
History	209
Foreign languages, literatures and linguistics	193
Precision production	191
Mathematics and statistics	179
Agriculture, agriculture operations and related sciences	176
Philosophy and religious studies	108
Total	25,552

Source: EMSI Economic Modeling 2017

MARS PETCARE'S COMMITMENT TO MIDDLE TENNESSEE

How is being located in the Nashville region important for Mars's business?

Mars Petcare has called Nashville home to our U.S. Headquarters since 2006. Middle Tennessee is a strategic location for us – it's centrally located and provides us with great access to our customers and manufacturing operations across the country. The Nashville region continues to experience tremendous growth, which is great for business and helps the region attract top talent from around the country. The quality of life that our associates experience here is unparalleled, and we're committed to maintaining our strong relationship with the Middle Tennessee community.

What factors were involved in Mars's recent decision to expand its headquarters in the Nashville region?

When we identified the need for new office space, we did a thorough search. It became clear that staying in Middle Tennessee was a priority. We wanted an engaging environment for our associates and a site that would provide proximity to Nashville, the airport, entertainment, shopping and other amenities. Currently, we have 1,000 associates in the Nashville area working from multiple locations. Our move to Ovation in Cool Springs will allow our Associates to work more collaboratively and efficiently in a space that meets our needs.

Pets are core to who we are. As a business that encourages associates to bring their dogs to work, we have dogs in the office every day. Our purpose is to make A Better World for Pets® and it's imperative that this comes across in our new office space. Our culture highly values collaboration and a sense of community, so creating an open work environment is a top priority. No one, not even the leadership team, has an office at Mars, and we will continue this open office concept in the new space. We're also planning indoor and outdoor meeting spaces that foster collaboration and interaction. Mars continues to earn recognition as a Great Place to Work®, so our ultimate goal is to design a space that is engaging and inspiring to current associates and is compelling to future talent.

What has been Mars' experience in hiring talent in the region? Are there any specific programs or partnerships that make recruiting a workforce easier?

We've found that the Nashville area is a very attractive market for job-seekers. With the continued growth of the Nashville region, we are seeing an increased pool of qualified applicants and feel confident in our ability to recruit top talent. Mars offers diverse opportunities for growth and our associates are encouraged to think broadly about their careers – taking the time to identify development opportunities that have a mutual benefit for our associates and the business, regardless of job function.

Working at Mars, associates are able to meaningfully connect with our purpose of making A Better World for Pets® and take part in signature programs including the Mars Volunteer Program (MVP), Mars Ambassador Program (MAP) and Better Cities for Pets™ program. We have been lucky to establish strong relationships with leaders in the region to establish programs focused on building our talent pipeline and establishing Mars Petcare's reputation in the community as a great place to work.

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

As a business that's dedicated to making A Better World for Pets®, it's no secret that pets are important to us. Data shows that pets are an important part of many families (now in more than 84 million households). No longer are pets simply household companions – pets are becoming an important part of our everyday lives – joining their owners at work, at the park and on shopping trips. Nashville is an exciting, growing region. But it's not just people who are moving into cities – pets are coming with them. In fact, based on current growth, the Nashville area could be home to more than one million pets in just a few years!

Unfortunately, pets aren't welcome everywhere. Often, there are policies that limit our ability to create pet-friendly places. At Mars Petcare, we created the Better Cities for Pets™ initiative specifically for this reason – to bring together leaders who can represent the voice of pets and help drive change to establish more pet-friendly cities.

Through Better Cities for Pets™, we're setting out to build pet-friendly communities across the country by supporting shelters homes, businesses and parks – starting in our own hometown of Middle Tennessee. In 2017, we kicked off this program with the cities of Nashville and Franklin to roll out programming and policies that support a model for what a pet-friendly city can look like and establish best practices for other cities across the country to learn from.

Each year, our 1,000 Nashville-area associates receive up to 16 hours of paid volunteer time to give back to their local communities through our Mars Volunteer Program. Last year, our associates built new dog parks, led beautification projects at our local shelters, and supported a weekend-long adoption event in partnership with local animal shelters.

We urge community leaders to join us in developing policies that celebrate the increasingly prominent role pets play in our lives and we encourage everyone to play a role by joining the movement at bettercitiesforpets.com.

REGIONAL TALENT INITIATIVES

Drive to 55

Tennessee's Drive to 55 initiative will get 55 percent of Tennesseans equipped with a postsecondary degree or certificate by 2025. It is projected that 55 percent of occupations will require this level of educational attainment, and Tennessee will be ready.

Tennessee Promise

Tennessee Promise is both a scholarship and a mentoring program focused on increasing the number of students who attend college in our state. It provides students a last-dollar scholarship, meaning the scholarship will cover tuition and fees not covered by the Pell grant, the HOPE scholarship or state student assistance funds. 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.

A critical component of Tennessee Promise is the individual guidance each participant will receive from a mentor who will assist the student as he or she navigates the college admissions process. This is accomplished primarily via mandatory meetings that students attend to remain eligible for the program. Tennessee Promise participants must complete eight hours of community service per term enrolled, as well as maintain satisfactory academic progress (2.0 GPA) at their institution.

Labor Education Alignment Program

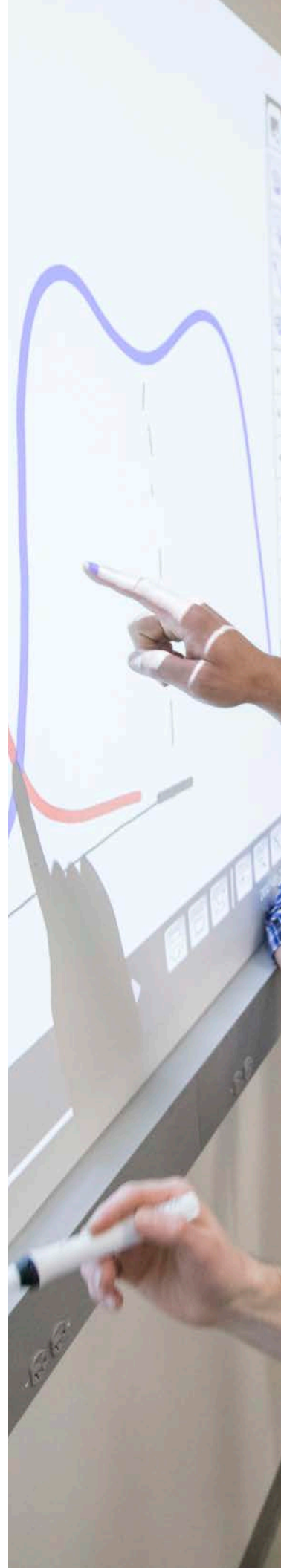
The Tennessee Labor Education Alignment Program (LEAP) ensures that postsecondary institutions are producing the skills and credentials Tennessee employers actually need. Tennessee LEAP eliminates skills gaps across the state in a proactive, data-driven and coordinated manner by encouraging collaboration across education and industry and by utilizing regional workforce data to identify and then fill skills gaps across the state.

Middle Tennessee Reconnect

The Middle Tennessee Reconnect Community is an 11-county collaborative effort dedicated to supporting the 200,000 adults in the region who attended college but did not receive a degree and are now aspiring to earn their degree. As part of the initiative, all Tennessee adults can now attend and earn a diploma or certificate at any Tennessee Colleges of Applied Technology (TCATs) or community college in Middle Tennessee completely free of tuition and fees. The joint effort includes public and private nonprofit higher education institutions; the region's three 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 is supported by a grant from Lumina Foundation and through Tennessee Reconnect, the state's strategy to help adults enter higher education to gain new skills, enter jobs that pay well or advance in their current workplace. The Middle Tennessee Reconnect Community's advisors, located in American Job Centers around the region, engage community organizations and employers to provide adults with advising, support and a personalized path to and through college. For more information, visit midtnreconnect.org.

Nashville GRAD

Nashville GRAD is a program created by Metropolitan Government of Nashville & Davidson County in partnership with Nashville State Community College and Tennessee College of Applied Technology Nashville to provide financial assistance for full-time students pursuing higher education in Davidson County. Nashville GRAD offers eligible students financial assistance in purchasing textbooks, transportation, industry certification fees, and emergency needs or in paying for industry certification fees and tools or equipment. Students also receive wraparound services including academic and career counseling.





YP Nashville

YP Nashville is a partnership among 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 to diverse opportunities for professional development, community involvement and networking and, ultimately, advance regional prosperity by building the next generation of community leaders. For more information, visit ypnashville.org.

We Build Tech

We Build Tech is a rich network of technology training and employment tools for individuals, educators and businesses. With resources that are specifically tailored to the Nashville community, the goal is to create a pipeline of talent and to see Nashville become a center for technology-based innovation and development. We Build Tech offers a suite of tools to help individuals discover and explore job and educational opportunities in tech including:

- Promotion of technology careers and companies
- Promotion of education programs and learning
- Helping tech professionals build skills
- Enhancing student and grad tech skills
- Connecting new talent to tech communities
- Connecting students to internships

For more information, visit webuildtech.com.



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 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, open space designs, 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 300 people across many different areas of the firm in the first few months 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 in 2019, 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 123,000 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 adds 83 people per day, providing the region's employers a continuous supply of available workforce.

Corporate headquarters in the region range from sectors including retail (Amazon, Dollar General, Tractor Supply Company, Kirkland's, Genesco) to health care (HCA, Community Health Systems, LifePoint) to manufacturing (Nissan, 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, Eventbrite, Postmates, SmileDirectClub, Houzz 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 entrepreneurial success.

COMPANY	LOCAL EMPLOYEES
Vanderbilt University Medical Center and Monroe Carrell Jr. Children's Hospital at Vanderbilt	23,627
Nissan North America	10,750
HCA Healthcare Inc.	10,613
Saint Thomas Health	6,100
Vanderbilt University	5,695
Community Health Systems Inc.	4,700
Asurion	3,750
Bridgestone Americas Inc.	3,539
National Healthcare Corp.	3,250
Cracker Barrel Old Country Store Inc.	3,085
Shoney's	3,000
AT&T Inc.	2,250
Dollar General Corp.	2,585
UnitedHealthcare	1,984
A.O. Smith Corp.	2,456
Ingram Content Group Inc.	1,842
State Farm Insurance Cos.	1,650

Source: NBj, 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**

OCCUPATION	JOB IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Accountants and auditors	9,499	\$30.06
Bill and account collectors	2,081	\$18.56
Billing and posting clerks	4,366	\$18.18
Computer operators	731	\$21.37
Customer service representatives	23,572	\$15.71
Data entry keyers	1,793	\$15.23
Executive secretaries and administrative assistants	3,055	\$24.73
Financial specialists	741	\$31.01
Human resources managers	1,634	\$44.19
Market research analysts	3,933	\$27.29
Payroll and timekeeping clerks	1,152	\$22.22
Receptionists and information clerks	6,726	\$13.77
Sales representatives, services	7,002	\$23.19
Switchboard operators, including answering service	537	\$14.54

Source: Chmura Economics, 2018

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

Bloomberg Business, 2019

**"No. 1 fastest-growing
Large Metro Economy"**

Headlight Data, August 2018

**"No. 1 Metro for
Economic Strength."**

POLICOM, January 2019

**158,551
people in
the Nashville
MSA have a
graduate or
professional
degree.**

U.S. Census Bureau, 2017

**The Nashville region is home to 13 Fortune 1000 companies
including 7 Fortune 500 headquarters.**

Fortune, 2018



HEALTH CARE MANAGEMENT

Nashville is widely recognized as a national health care industry capital and global health care industry leader. With a reputation for nurturing 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 nearly \$46.7 billion and more than 270,000 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. Eighteen 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 121,000 PEOPLE.

LEADING HEALTH CARE EMPLOYERS	LOCAL EMPLOYEES
Vanderbilt University Medical Center	23,627
HCA Holdings	10,613
Saint Thomas Health	6,100
Community Health Systems	4,700
National HealthCare Corp	3,250
UnitedHealthcare	1,984
Change Healthcare	878
eviCore Healthcare	600
Brookdale Senior Living	566
Premise Health	535
MEDHOST Inc.	424

Source: NBS, 2019

HEALTH CARE WAGES	JOB IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Clinical laboratory technologists and technicians	3,370	\$28.10
File clerks	767	\$16.37
Health educators	217	\$17.99
Healthcare social workers	781	\$26.19
Home health aides	1,745	\$10.73
Licensed practical and licensed vocational nurses	6,555	\$20.02
Medical and health services managers	3,876	\$45.51
Medical assistants	3,967	\$15.89
Occupational health and safety specialists	454	\$33.85
Purchasing managers	622	\$48.82
Receptionists and information clerks	6,726	\$13.77
Registered nurses	21,069	\$29.83
Surgical technologists	950	\$21.89

Source: EMSI, 2018

18 PUBLICLY TRADED HEALTH CARE COMPANIES IN THE NASHVILLE REGION.

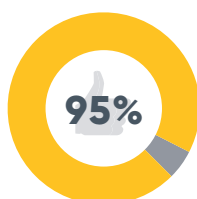
MORE THAN **1.6 BILLION** IN VENTURE CAPITAL WAS INVESTED IN NASHVILLE HEALTH CARE COMPANIES OVER THE PAST 10 YEARS.



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.

FORTUNE 100 HEALTH CARE LEADER HCA CONTINUES TO COMMIT TO NASHVILLE

Nashville-based HCA is one of the nation's leading providers of healthcare services, comprising 170 locally managed hospitals and 118 freestanding surgery centers in 20 states and the United Kingdom. With its founding in 1968, HCA created a new model for hospital care in the United States, using combined resources to strengthen hospitals, deliver patient-focused care and improve the practice of medicine.

From the study demonstrating that early elective delivery of babies is not as good as full-term delivery, to the study identifying a method to reduce all bloodstream infections by 44% more than previously known best practices, HCA is a learning healthcare system that uses its more than 26 million annual patient encounters to advance science, improve patient care and save lives.

Throughout its history, HCA has invested in the Nashville community, most recently completing a \$200 million office building in the Capitol View development bringing around 2,000 jobs to the area. HCA currently employs approximately 16,500 people in the Middle Tennessee area and invests approximately \$15 million locally through annual charitable giving.



"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



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 4.9 percent per year, with a 16% increase in technology companies and an estimated 46,000 tech workers in

2018. The tech industry has a \$5 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 30 PERCENT"

OVER THE PAST 5 YEARS, OUTPACING OVERALL JOB GROWTH IN THE AREA BY 15 PERCENT AND NATIONAL TECH JOB GROWTH BY 10 PERCENT."

- ZipRecruiter, 2018

"#4 BEST PLACE IN AMERICA FOR STARTING A BUSINESS"

-Inc. Magazine, January 2019

LEADING TECHNOLOGY EMPLOYERS

AllianceBernstein
Amazon
Asurion
Change Healthcare
Deloitte
Dollar General Corp.
Emma
EY
Eventbrite
eviCore Healthcare

HCA
HealthStream Inc.
LBMC
Lifeway Christian Resources
Lyft
Nissan
Philips
Postmates
UBS
Vanderbilt University and Medical Center

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.

Nashville was identified as the ideal location for the new Center of Excellence during Amazon’s 14-month long search for its second headquarters. “We decided fairly late in the process that it would be best to split the headquarters into two locations. As part of that discussion, we also realized what an attractive place Nashville would be to our company,” said Brian Huseman, vice president of public policy for Amazon. “There’s just so much to like about Nashville. It’s the right amount of office space, the right city size, the right talent, the right ability to attract more talent that our operations team needs. It seemed like the perfect fit for the size of this operations team and really the place where we could centralize our East Coast operations.”

In an interview, Holly Sullivan, head of economic development for Amazon, recognized the 30 years of

regional collaboration of the Nashville Area Chamber of Commerce’s Partnership 2020 initiative in laying the foundation for a project like this. “The entire regional team planted a lot of seeds for diverse economic growth, it’s rewarding to come back and experience the fact that those seeds are now growing.” That growth is evidenced in factors unique to Nashville that stood out throughout Amazon’s search: the number of people moving to the region, fueling its average population gain of 100 people a day; an established “creative class,” including the music industry; an emerging crop of tech talent; 24 colleges and universities; its business climate; its lower taxes and cost of living, relative to major markets; and its quality of life.

“Nashville is a very natural location for a project focused on our logistics business,” Sullivan said. “We are a creative culture. A lot of those leadership principles were naturally present during our site visits as we met with people here.”

When complete, Amazon’s Operations Center of Excellence will rank as downtown Nashville’s largest private employer. Amazon will occupy a 20-story tower on Church Street, a gateway into downtown Nashville.

INFORMATION TECHNOLOGY OCCUPATION	JOBS IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Computer and information research scientists	42	\$42.94
Computer network architects	996	\$48.00
Computer network support specialists	1771	\$29.01
Computer occupations, all other	1834	\$37.59
Computer programmers	1535	\$35.76
Computer systems analysts	3893	\$35.81
Computer user support specialists	3883	\$23.36
Database administrators	733	\$42.13
Information security analysts	625	\$37.89
Network and computer systems administrators	2177	\$39.57
Software developers, systems software	2409	\$41.75
Web developers	760	\$30.87

Source: EMSI, 2018

TECH GIANT EVENTBRITE CHOOSES NASHVILLE

A CONVERSATION WITH NASHVILLE'S HEAD OF ENGINEERING, BRYAN MAYES

Why did you choose to open an Eventbrite office in Nashville?

We chose Nashville from a pool of fantastic markets as our second city to set up operations in the U.S. outside of San Francisco. In addition to being able to tap into Nashville's amazing talent pool, it has also been a huge benefit that our culture and values are largely shared with the Nashville community. As the world's largest self-service ticketing and event technology platform, Eventbrite's passion for live events fits well in Music City.

Why does Eventbrite continue to grow and do business in Nashville?

Nashville has been a great expansion opportunity for Eventbrite. We started in Nashville focusing on hiring customer experience professionals and were thrilled with the incredible talent here. We have since expanded our operations in Nashville and built out an even more robust team to include engineering and sales professionals. We are constantly trying to build career opportunities for people on all our teams. Eventbrite is all about helping people grow personally and professionally, and we are highly supportive of internal mobility.

What has your experience been in hiring talent in the Nashville region?

Our continuing to add teams to Nashville is a testament to the incredible talent in the Nashville area. As a member of the software engineering team, I can most confidently speak about our technology team. The level of talent is extremely high, and we have found highly seasoned senior developers as well as a community of well-trained juniors who have grown with us into some of our strongest team members.

How has it been personally relocating to living in Nashville?

My wife and I moved just south of Nashville a few years ago from the Silicon Valley area. We are both employed in the technology industry. We were drawn to this city over others because of nearby family, great schools for our kids, insanely lower cost of living and the fact that it had a growing tech community that would allow us to continue doing what we love for work. When we made the decision to move, I was worried it might be a mistake. Today, I feel like not moving would have been a mistake. We love our lives and our careers here, and I'm happy to be a part of this vibrant and growing community.

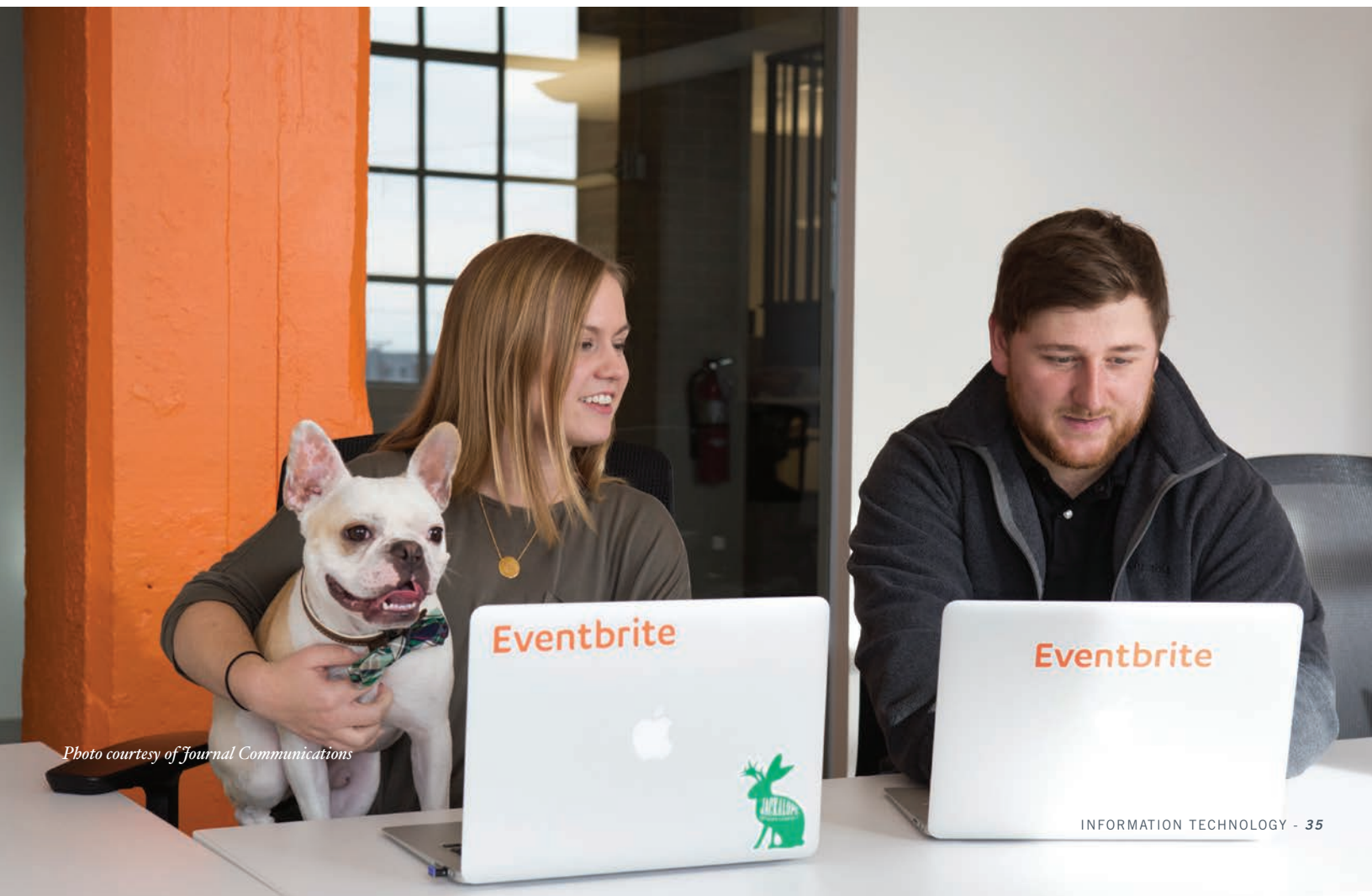


Photo courtesy of Journal Communications

MUSIC & ENTERTAINMENT

With live music of all genres being performed every night of the week, more than 190 recording studios and more than 5,000 working musicians, 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 per capita 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 *Travel + Leisure*, *The New York Times*, *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, Justin Timberlake, Jack White, 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	

\$10 BILLION
TOTAL ANNUAL INDUSTRY IMPACT
WITHIN THE NASHVILLE MSA

\$5.5 BILLION
ANNUAL CONTRIBUTION
TO THE LOCAL ECONOMY

56,000
MUSIC INDUSTRY JOBS
IN THE NASHVILLE REGION

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

"In 2016, Warner Music Group decided to relocate a number of its financial, legal and administrative services. We chose Nashville because of its position as a long-standing hub for the music industry, its vibrant economy and creative culture, its low cost of living, and its low cost of doing business."

**-Kris Ahrend, President,
U.S. Shared Services –
Warner Music Group**



MUSIC AND ENTERTAINMENT OCCUPATIONS	2018 JOBS	MEDIAN HOURLY EARNINGS
Accountants and auditors	7,488	\$30.06
Agents and business managers of artists, performers, and athletes	356	\$31.93
Audio and video equipment technicians	559	\$20.12
Entertainers and performers, sports and related workers	264	\$17.27
Executive secretaries and executive administrative assistants	6,039	\$24.73
Financial managers	4,085	\$51.12
Graphic designers	1,323	\$24.19
Human resources managers	648	\$44.19
Musicians and singers	2,335	\$27.28
Photographers	193	\$14.07
Producers and directors	562	\$29.41
Public relations specialists	1,165	\$25.54
Radio and television announcers	182	\$18.41
Sound engineering technicians	296	\$24.00

Source: Chmura Economics, 2018

ADVANCED MANUFACTURING

Over the past two decades, the Nashville region's premier location, skilled workforce, labor cost advantages and advanced training and 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 15 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 and 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	10,750
General Motors	3,800
Bridgestone Americas Inc.	3,539
Electrolux Home Products North America	3,200
A.O. Smith Corp.	2,456
Tyson Foods Inc.	1,600
Dell	1,500
Schneider Electric	1,416
Hankook Tire America Corp.	1,200
Trane Co.	1,100
UniPres USA Inc.	1,062
General Mills Inc.	1,028
Adient	1,000
Mars Petcare US	1,000
Vi-Jon	728
Lochinvar	577

Source: Book of Lists, 2018-2019; ReferenceUSA, 2018

ADVANCED MANUFACTURING OCCUPATION	JOBS IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
Drafters	85	\$22.43
Industrial engineers	1,711	\$40.32
Construction laborers	6,516	\$14.90
Mechanical engineers	1,030	\$35.44
Operating engineers and other construction equipment operators	1,816	\$18.49
Painters, construction and maintenance	807	\$17.44
Paving, surfacing, and tamping equipment operators	246	\$20.25

98,663 MANUFACTURING JOBS IN THE NASHVILLE REGION



33,908 NEW JOBS IN THE NASHVILLE REGION'S MANUFACTURING SECTOR SINCE 2010



NO. 2 FASTEST GROWING LARGE METRO FOR MANUFACTURING JOB GROWTH OVER THE PAST 5 YEARS.



NO. 4 STATE FOR DOING BUSINESS

-AREA DEVELOPMENT, SEPTEMBER 2018



Source: Chmura Economics, 2018



"Nashville is experiencing dynamic growth, and the city is hitting its stride. We're honored and excited to be a part of that growth. From adding new jobs to supporting the community through philanthropy, volunteerism and leadership, we are investing significantly in the growth and success of Nashville."

-Gordon Knapp, CEO and president, Bridgestone Americas; vice president and senior officer, Bridgestone Corporation; and member of the board of Bridgestone Americas, Inc.

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 a 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.

100,000+
**DISTRIBUTION &
TRADE JOBS**
IN THE NASHVILLE REGION

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
--	--------------------

Nissan North America	10,750
Bridgestone Americas	3,539
Electrolux Home Products	3,200
Amazon	3,094
A.O. Smith Corp.	2,456
Ingram Content Group	1,842
Lifeway Christian Resources	1,168
General Mills	1,028
CEVA Logistics	845
GAP	815
Under Armour	500
Western Express	370

Sources: Book of Lists, 2018-2019;
Dun & Bradstreet, 2018

DISTRIBUTION AND TRADE OCCUPATION	JOB IN NASHVILLE MSA	MEDIAN HOURLY EARNINGS
--------------------------------------	-------------------------	---------------------------

Air traffic controllers	202	\$66.49
Airfield operations specialists	60	\$23.30
Cargo and freight agents	443	\$21.57
Commercial pilots	177	\$21.26
Conveyor operators and tenders	268	\$15.18
Heavy and tractor-trailer truck drivers	15,662	\$20.71
Light truck and delivery service drivers	5,588	\$16.40
Motor vehicle operators	408	\$11.45
Pump operators	35	\$20.01
Tank car, truck, and ship loaders	53	\$20.32
Transportation security screeners	297	\$17.12
Transportation workers, all other	211	\$11.91

Source: Chmura Economics, 2018





LIVABILITY

QUALITY OF LIFE

Living and working in the Nashville MSA has many advantages that appeal to companies and workers considering a 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**



**\$10 BILLION
MUSIC INDUSTRY IMPACT**



180+
ARTS-RELATED NON-PROFITS



280
DOWNTOWN RESTAURANTS, BARS
AND NIGHTLIFE ENTERTAINMENT OPTIONS



11,000
RESIDENTS LIVE DOWNTOWN



2,400+
BUSINESSES OPERATE
IN DOWNTOWN NASHVILLE



72,000
PEOPLE WORK IN THE DOWNTOWN CORE

MUSEUMS AND FESTIVALS

- 3686 Entrepreneurship Festival
- 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
- Jefferson Street Jazz & Blues Festival
- Johnny Cash Museum
- Live on the Green Music Festival
- 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 Parthenon



**Nashville
Predators**
NHL



**Tennessee
Titans**
NFL



**Nashville
Sounds**
MLB



**Nashville Zoo
at Grassmere**



**Nashville
Soccer Club**
MLS - Coming soon



56
GOLF COURSES



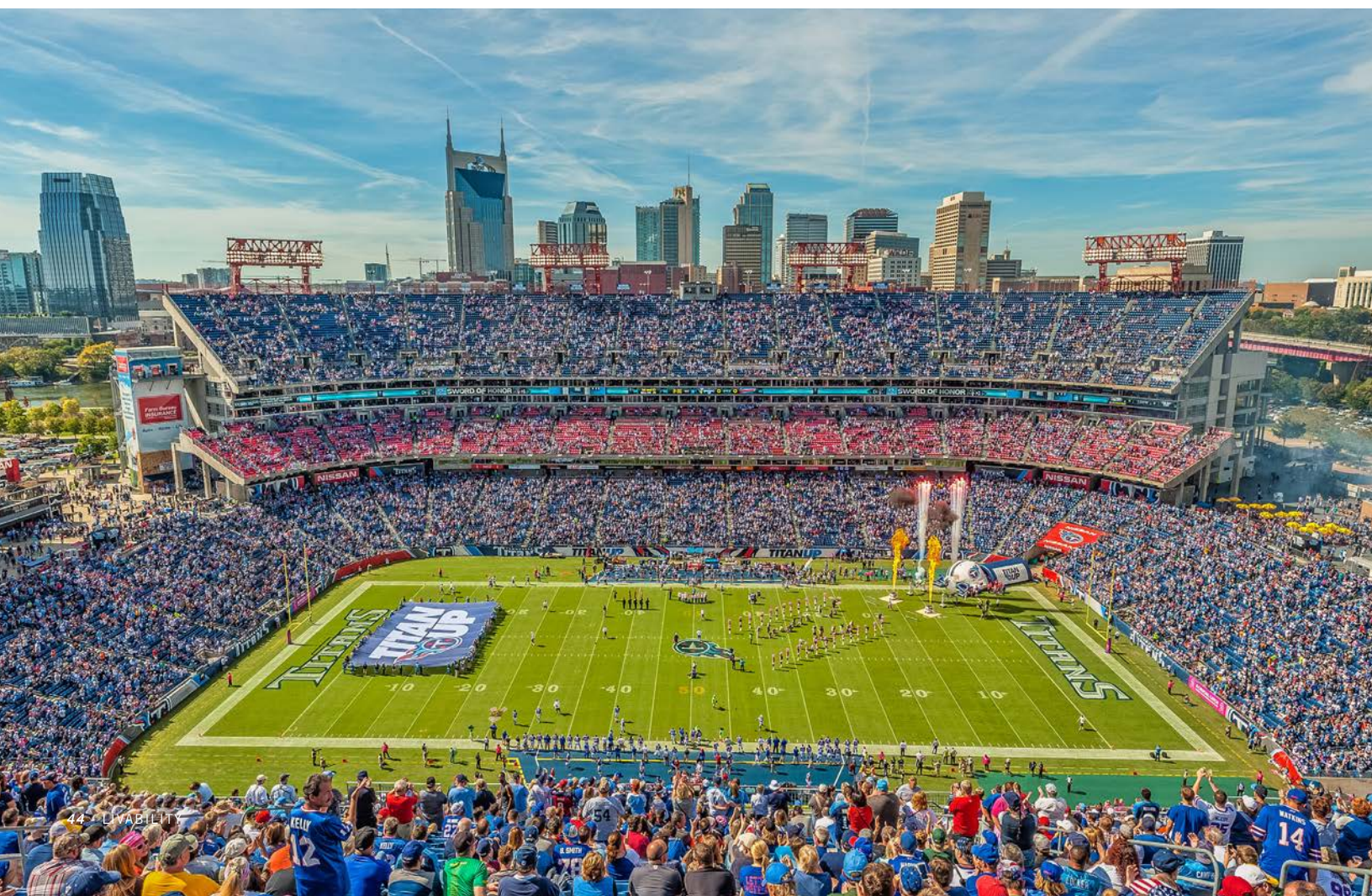
80 MILES
OF PAVED TRAILS



100+
PUBLIC PARKS



30,000 ACRES
OF PAVED TRAILS





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 2016.



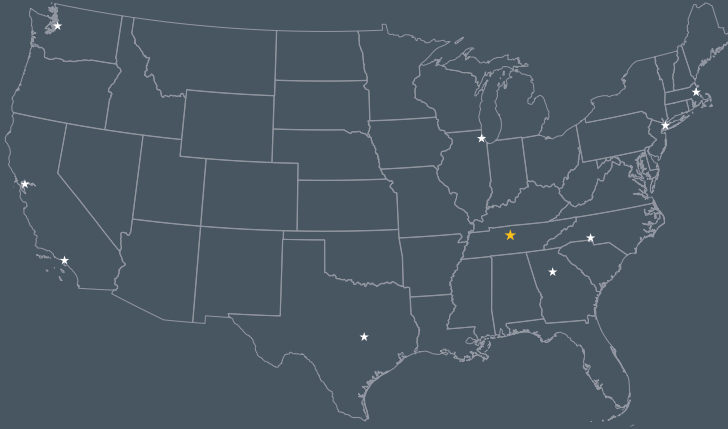
1 IN 8 DAVIDSON COUNTY RESIDENTS
IS FOREIGN-BORN



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

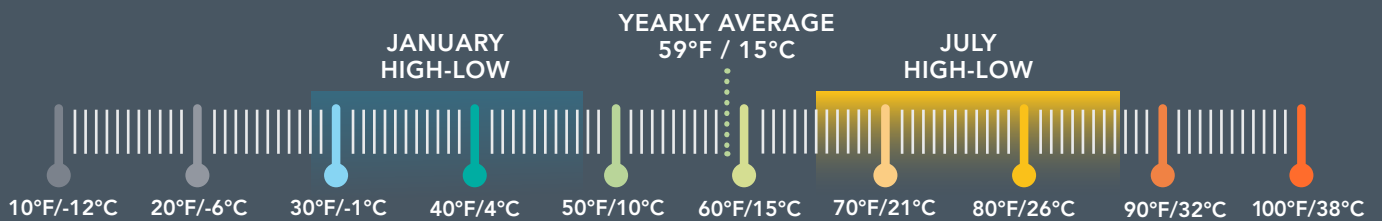
NASHVILLE IS **HOME TO LARGE POPULATIONS OF**
HISPANIC, MIDDLE EASTERN, KURDISH AND SOUTH AND SOUTHEAST ASIAN.

COST OF LIVING



NYC	243.4
San Francisco	193.8
Boston	148.9
Seattle	153.5
Los Angeles	147.9
Chicago	123.1
Atlanta	101.5
Austin	98.9
Nashville	98.8
Charlotte	96.8

CLIMATE AND SETTING



DAYS OF SUNSHINE PER YEAR

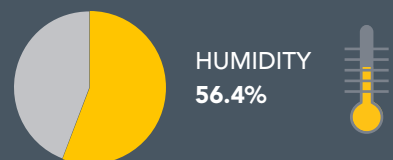


ELEVATION

TENNESSEE
900 ft. / 274.32m

NASHVILLE
500 ft. / 167.6m

AVERAGE RELATIVE HUMIDITY

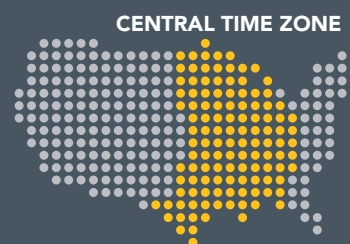


AVERAGE ANNUAL RAINFALL

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 Courtney Ross at 615-743-3022 or cross@nashvillechamber.com.



nashvillechamber.com

