

NASHVILLE ECONOMIC PROFILE

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2020

Drawing CROWDS

TOURISTS, TALENT AND BUSINESSES FROM
ACROSS THE GLOBE ARE FLOCKING
TO THE NASHVILLE AREA

5

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with their own flair, await
those who are ready to
move to the region

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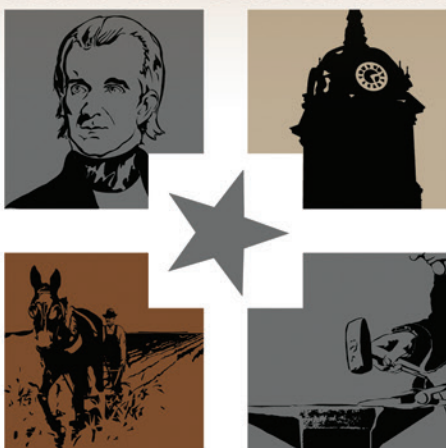
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NASHVILLE ECONOMIC PROFILE

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YOUR

BUSINESS

YOUR

CHAMBER

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Together, we are committed to the prosperity of our region and community.

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QUALITY OF LIFE

Whether it's digging into the area's best dishes or diving into its lively cultural scene, locals are living their best lives. Explore how Nashville, Tennessee, plays during the day – and night.



STAY INFORMED

Moving to Nashville, Tennessee, might make sense for your bottom line. See how the numbers add up.



INNOVATION

Explore the area's cutting-edge business technologies, forward-thinking community planning strategies and much more.



TALENT

Discover how educational institutions and local businesses are providing an attractive package for prospective employees from around the world.

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Each article can be read as a stand-alone feature on livability.com/tn/nashville or within the digital magazine.

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PHOTOS, CLOCKWISE: JEFF ADKINS; WENDY JO O'BARR; JEFF ADKINS; NATHAN ZUCKER



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Nashville's General Jackson Showboat offers visitors and residents stunning views of downtown from the Cumberland River. Photo by **Jeff Adkins**

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The advanced manufacturing industry supports over 84,000 jobs in the Nashville area.

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GLOBAL BUSINESS

International Flavor

The Nashville area's location, business environment and culture are a draw for companies across the globe.

L
I
V
E



1
HOUR
From
Nashville

W
O
R
K



3
Strategic
Interstates

P
L
A
Y



75
MILES
of
Duck River

A great location for the future.

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More than
342 FOREIGN-OWNED COMPANIES
from 29 different countries have operations in the Nashville area, employing more than
51,000 MIDDLE TENNESSEANS.

ECONOMIC DYNAMO

From advanced manufacturing and automotive production to logistics, health care, entertainment and technology, the fast-growing region of more than 1.9 million people and nearly 43,000 businesses has written an astounding success story of investment, expansion and job creation.

THE NASHVILLE AREA IS DIVERSE AND WELCOMING. INTERNATIONAL MIGRATION ACCOUNTED FOR **22%** OF ALL NET MIGRATION IN 2018.

Sky's the Limit

Nashville International Airport (BNA) offers on average 576 daily flights from 15 carriers with more than 74 nonstop destinations. BNA, which offers direct service to London via British Airways, is in the midst of a \$1.2 billion construction expansion.

Good Company

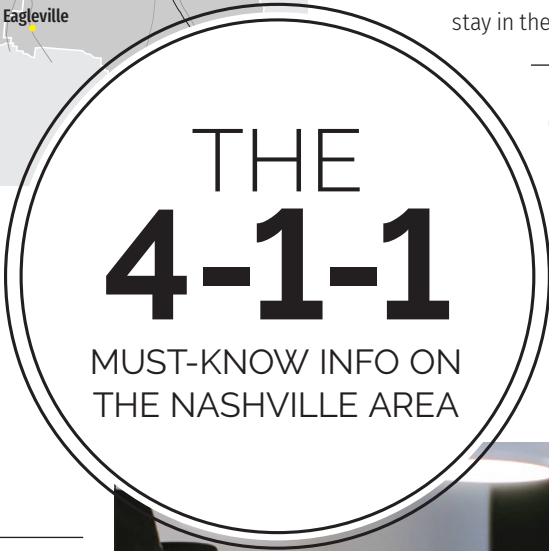
A who's who of companies make their home in the Nashville area, from HCA Healthcare to Nissan, Bridgestone Americas, Tractor Supply Company and Dollar General. They're being joined by new arrivals, including Amazon, Mitsubishi and AllianceBernstein.

HEAD OF THE CLASS

Two dozen higher education institutions, including research powerhouse Vanderbilt University, give the region academic heft. More than 123,000 students are enrolled in higher education in the Nashville area, the largest concentration in a four-state region. More than 60% of students attending Nashville-area colleges stay in the region after graduating.

Off the Charts

While music and entertainment is a major economic sector, the region's No. 1 employer is the health care industry. More than 400 health care companies are in the Nashville MSA, generating a \$40 billion economic impact.



Nashville made *Forbes'* Top 10 American Cities for Family-Friendly Travel in 2019 list and landed on the 2019 Trip Advisor Travelers' Choice list of Top 25 Destinations in the U.S.

Discover Nashville

The 10-county Nashville area draws investment and talent from around the world

Sounds Great

A new attraction is making a splash at one of the region's premier destinations.

SoundWaves is a new indoor waterpark at Gaylord Opryland® Resort & Convention Center. SoundWaves features 111,000 square feet of indoor rides and attractions in an 84-degree setting and is open year-round to hotel guests. Another 106,000 square feet of space is dedicated to outdoor water attractions during the warm weather months.

The name SoundWaves derives from a diverse blend of music- and water-featured attractions, such as body slides, a rapids river, a lazy river, a wave pool, a tubing slide, surfboarding and a children's splash pad. The overall \$90 million investment by Gaylord Opryland was designed to draw more guests to the 2,888-room hotel, shopping and entertainment complex.



111K

Square feet make up SoundWaves indoor waterpark at Gaylord Opryland® Resort & Convention Center.

COUNT ON THEM

Nashville has become an address of choice for global companies, including Amazon, Mitsubishi, AllianceBernstein and SmileDirectClub.

Add to that list multinational accounting and professional services company EY, which recently opened a 600-person office in Nashville's famed Music Row district. The London-based company looked at 18 U.S. cities before settling on Nashville to establish its new \$22

million EY Exceptional Delivery Growth Engine Center (EDGE), which specializes in tax-managed services, software development, and design and testing. EY chose the region because of the large number of available college students with business and IT skills in the area.

Forbes has named EY one of the 100 Best Companies to Work for in America for the last 20 years.



Livability.com ranked Nashville among its Top 100 Best Places to Live in 2019.



Cowabunga

The work of a Nashville technology company is taking center stage at a slew of major entertainment events.

Moo TV provides video services and creative content for events ranging from music concerts to TV award shows. The company's technical services have extended to clients worldwide for the past 20 years, producing video production events for clients such as Garth Brooks, Jason Aldean, Reba McEntire, Brad Paisley and the Nashville Predators.

Moo TV also owns The Steel Mill in Nashville, a building the company purchased to offer space for rehearsals, filming and special events. In 2018, Moo TV won in the Music and Media/Entertainment Market Mover category in the Nashville Entrepreneur Center's annual NEXT Awards.



CHART TOPPING

Nashville is known around the world as Music City, with a reputation built on country music. But the region has a broad music repertoire that includes gospel, rock, hip hop and jazz.

The region enjoys the highest concentration of music industry establishments in the nation, represented by global corporations, small businesses and independent artists, songwriters and musicians as well as music performance, composition, distribution, promotion, production, training and education, artists' rights groups, music organizations, live music venues and equipment.

According to the Music City Music Council, the region hosts 190 recording studios, 130 music publishers and 80 record labels. The industry, which supports 56,000 jobs in the region, delivers a \$9.7 billion economic impact in the Nashville MSA.

56K

Jobs are supported by the music and entertainment industry in the Nashville MSA.

\$9.7B

The economic impact of the music industry on the Nashville area.

SAILING RIGHT ALONG

Ahoy, there: The boat manufacturing industry is moving full speed ahead in the Nashville area, as evidenced by three recent projects.

In 2019, Caymas Boats announced a planned \$30.3 million investment for a new assembly plant in Ashland City that will create up to 280 jobs in Cheatham County over the next five years. Employees produce premium fiberglass, saltwater and freshwater boats for fishing and other recreational

activities. Also in Ashland City, Arcosa Marine announced it will expand its existing barge manufacturing facility, investing \$10 million and eventually creating 300 jobs over the next five years.

In White Bluff in Dickson County, boat manufacturer Ebbside Holdings established an assembly plant and will create nearly 100 jobs over the next five years to build sporting boats ranging from 20-30 feet in length.



NASHVILLE STARS

A region that draws and keeps talent brings business investment and expansion and plenty of job opportunities

By Teree Caruthers

For decades, the Nashville area has been a beacon for artists and musicians searching for a place to fuel their creative fires.

The same forces that attracted generations of music legends — a creative spirit, a diverse and friendly culture, affordability, a key location and a bevy of talent — continue to lure business investment and entrepreneurial enterprise across a range of industries, from advanced manufacturing and automotive production to logistics and health care to entertainment and technology.

Still Growing Strong

In addition to serving as a headquarters for global brands, such as HCA Healthcare, Nissan, Bridgestone Americas, Tractor Supply Company and Dollar General, the Nashville area is a choice destination for relocating and expanding companies from across the country.

“Nashville has clearly had a lot of success in the last couple of years. We’ve had record job growth as well as record population growth,” says

Courtney Ross, chief economic development officer for the Nashville Area Chamber of Commerce. “Our economy is very diverse and robust, and it’s growing.”

In November 2018, Amazon tapped Nashville for a new Operations Center of Excellence that will house the technology and management functions for the company’s customer fulfillment, transportation and supply chain activities. The center will create 5,000 high-paying jobs and more than 1 million square feet of energy-efficient office space at Nashville Yards in downtown Nashville. It is the largest single jobs announcement in Tennessee history and is projected to generate more than 8,000 indirect and induced jobs.

“(Nashville) is a city pointing toward the future,” says Jay Carney, Amazon senior vice president. “It made itself very appealing for investment. It’s a place where if people don’t already live there, they are excited about moving there.”

In its search, Amazon noted a number of factors unique to Nashville that lined up with its business, such as the number of people moving to the region, an established “creative class,” including the music industry, and an

Companies such as Mars Petcare (top row center), Bridgestone Americas (center row right) and SmileDirectClub (bottom row right) have found the Nashville area to be a great fit to further grow and develop their businesses.



PHOTOS: JEFF ADKINS



emerging crop of tech talent stocked in part by 24 colleges and universities.

The region's pro-business culture and diverse economy played a role in The ICEE Company's decision to move its corporate headquarters from California to La Vergne. The frozen beverage producer has relationships with a number of national companies based in Tennessee, including the Regal Cinemas theater chain and retailers Dollar General and MAPCO.

"What we love about this area and why we wanted to bring our headquarters here is it's such a business-friendly spot," says ICEE CEO Dan Fachner. "Tennessee is also centrally located to so many of our customers nationally."

Healthy Competition

With more than 400 health care companies operating in the Nashville area, health care continues to lead the region's high-growth industries. Ross says a key advantage has been the ability to grow many different target sectors within the industry.

SmileDirectClub, for example, has found Nashville to be a great fit, as the teledentistry company continues to expand its business. SmileDirectClub plans to create more than 2,000 jobs in the area over the next five years, a \$217 million investment.

"Nashville is a diverse, talented and welcoming city and has proven time and again to be a great fit for



SmileDirectClub," says John Sheldon, the company's chief marketing officer. "Known as the health care capital of the Southeast, Nashville was the obvious choice for our headquarters. The synergies between Nashville's rich history and our innovative business model fueled our growth."

Talent Shows

Perhaps the secret ingredient in the Nashville area's special sauce is the large pool of educated and skilled talent available to businesses.

"We're a magnet for talent," Ross says. "Not only do we have an educated population thanks to the pipeline of talent through our colleges and universities, but we're a talent magnet for young professionals and educated individuals who want to

move to Nashville. It's a great place to live. It's vibrant, it's got tremendous culture, tremendous vitality, and that's what's attracting the talent pool, which is attracting the companies to move here."

SmileDirectClub's Sheldon agrees.

"The unique and robust culture of Nashville, from live music, art and cuisine to history, nature and compelling sports teams, is an obvious factor that attracts top talent from across the country," he says. "The reasonable cost of living with low property taxes, no state income tax and top-ranked school districts are also meaningful draws for families. Not only that, but the booming job market and commitment from companies to expand here are meaningful for trailing spouses and family members."

NASHVILLE YARDS BY THE NUMBERS

400,000+

Square Feet for Retail & Entertainment

1,000+

Residential Spaces

3.5 m+

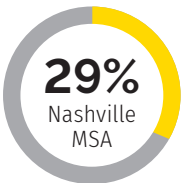
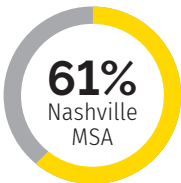
Square Feet of Creative Office Space

1,100+

Hotel Rooms



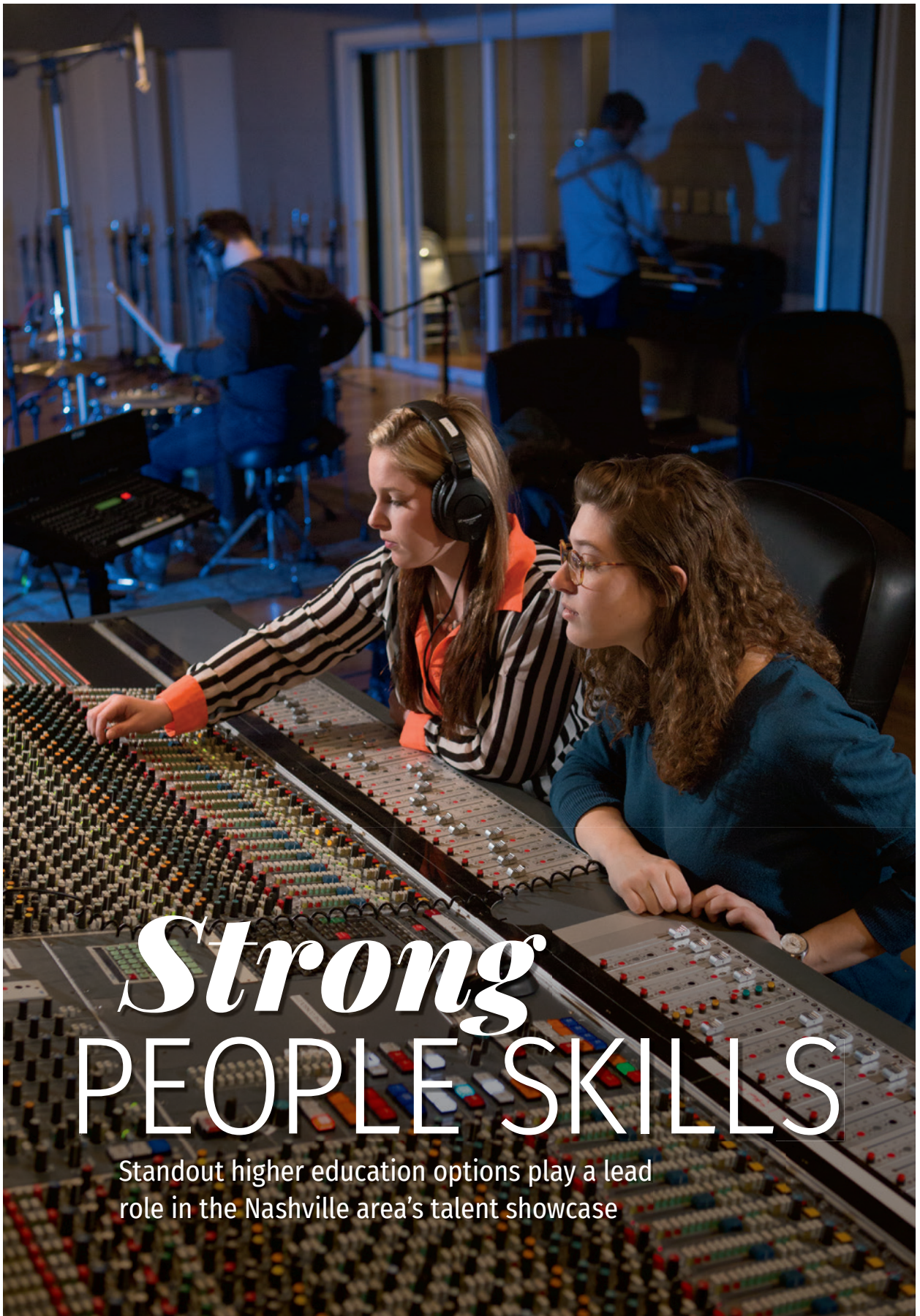
PHOTO: FROM TOP: JEFF ADKINS; NASHVILLE YARDS

Growth <i>(2010-2017)</i>		“... We’re a talent magnet for young professionals and educated individuals who want to move to Nashville. It’s a great place to live. It’s vibrant, it’s got tremendous culture, tremendous vitality ...” — Courtney Ross, Nashville Area Chamber of Commerce	Fortune 500 Companies in the Nashville Area <i>(2019 Ranking)</i>	
Jobs  29% Nashville MSA 13% U.S. 15% TN	GDP  61% Nashville MSA 30% U.S. 36% TN		19 HCA Healthcare 123 Dollar General 160 Community Health Systems 198 Envision Healthcare 384 Delek US Holdings 390 LifePoint Health 391 Tractor Supply Company	
Economic Drivers				
Health Care Management 273K JOBS \$46.7B Annual Economic Impact	Music & Entertainment 60K JOBS \$10B Annual Economic Impact	Manufacturing 83.8K JOBS \$19.3B Annual Economic Impact	Tourism & Hospitality 116.3K JOBS \$9.3B Annual Economic Impact	



BIG THINGS TO COME

Asurion, one of Greater Nashville's biggest private companies, plans to move thousands of employees to a new Gulch headquarters developed by Highwoods Properties, the region's largest office landlord. A \$285 million project planned to encompass 551,000 square feet, including 8,000 square feet of retail.



Strong PEOPLE SKILLS

Standout higher education options play a lead role in the Nashville area's talent showcase

By Teree Caruthers

A diverse and growing economy. Career opportunities. Affordability. Diversity. Cultural vibrancy. The Nashville area checks all the boxes for attracting talent.

With the 123,000 students enrolled annually in its 24 colleges and universities, the Nashville area offers a deep and diverse talent pool.

“We are a talent magnet,” says Nancy Eisenbrandt, chief talent development officer for the Nashville Area Chamber of Commerce.

“We have between 50 and 60 people moving here each day,” she says. “We see young professionals and young families relocating from the coast and/or the midsection of the country who are looking for a more dynamic and affordable place to live with a robust job market. Relocating companies and expanding firms are able to recruit talent from other communities but also find talent who are already residing in the region.”

Brentwood-based Gallagher, a leading insurance brokerage and risk management services firm, conducted a benefits and benchmarking study in 2018 and found that attracting and retaining talent tops the operational priorities of companies.

And that’s where Nashville shines, says Stephanie Hawkins, Gallagher area vice president of human resources and benefits consulting and president-elect of the Middle Tennessee Society for Human Resources Management.

Crowd Pleaser

“Nashville has the typical advantages like our accessibility and tax benefits, but I think that businesses want to be in a place where they can find good talent. Businesses place such a high emphasis on the workforce, getting people in the door and keeping them there. Nashville’s a place where people come to stay,” Hawkins says.



Vanderbilt University is only one of the 24 colleges and universities in the Nashville area.

Homegrown Talent

Eisenbrandt says the array of colleges and universities — from technical and community colleges to public universities and private institutions — create a broad cross section of skill building and learning opportunities for full-time students and those looking to strengthen or add skills at various stages of their careers.

“That’s a true advantage for us,” she says. “Plus, the attractive Nashville job market means that many of those individuals stay once they complete their degree or credential.”

Nashville’s workforce also benefits from the state’s Drive to 55 initiative, which works to ensure that 55% of state residents have a college degree or credential by 2025. The Nashville Area Chamber of Commerce actively participates in that effort through

Educational Attainment

(age 25 and over)

90.3%

High school graduates

12.3%

Graduate/professional degrees

23.7%

Bachelor’s degrees

7.2%

Associate degrees

20.3%

Some college, no degree

a number of programs and initiatives, such as facilitating a partnership between the Metro Nashville Public School System and local industries to create specific career pathways in high schools.

The chamber also works to make companies aware of workforce development programs like Tennessee Reconnect. Part of the state's Drive to 55, Tennessee Reconnect helps the 250,000 working adults in the region who are just shy of completing all the requirements for a degree find the resources to finish college.

Campus Credibility

Nashville-area colleges and universities are, of course, the backbone of the region's workforce development efforts. Middle Tennessee State University (MTSU) in Murfreesboro, for example, plays a crucial role in helping community college students, technology center graduates and working adults finish their degrees and join the workforce more quickly.

"MTSU is the No. 1 choice of transfer students, adult learners and first-generation college students in the Volunteer State," says MTSU President Sidney A. McPhee. "As such, MTSU serves as the capstone of Tennessee's higher educational program built on the Tennessee Promise and the Drive to 55 initiative to increase the number of Tennesseans with advanced degrees and certifications."

One in five college graduates in the Nashville area holds an MTSU degree, says McPhee, and 79% of MTSU graduates remain in Tennessee — 56% of whom end up making their home within an hour's drive of Nashville.

"Our alumni run companies. They win Grammys. They teach our children. They cure diseases. They create, innovate and succeed. From aerospace to agriculture and finance to health care and concrete management, our grads are ready to work," McPhee says.

MTSU students (top and bottom right) are provided with the resources they need to obtain their degrees and join the workforce more quickly.



123,000

Students are attending the area's colleges and universities.

60%

College graduates who remain to work in the region.



PHOTOS, FROM TOP: BRIAN MCCORD; ERIC SUTTON

Well-Schooled

NASHVILLE AREA EDUCATORS EARN AN “A” IN COLLABORATION

By Teree Caruthers

School districts throughout the Nashville area partner frequently with higher education institutions, businesses and industry to develop programs that show attractive career pathways to students.

In fact, 365 employers partner with 12 high schools and 39 academies in Metro Nashville Public Schools.

In Rutherford County, the Rutherford Works High School Internship Program is a partnership with employers to offer students productive and meaningful summertime work assignments with a learning component ideally related to their area of interest.

Rutherford Works is open to high school seniors, with interns paid \$10 per hour to work 20 hours a week every Monday through Friday during the month of June. Students can choose to intern with companies that specialize in any of the following 11 areas – agriculture, architecture and construction, business and finance, government and public administration, health sciences, hospitality and tourism, information technology, manufacturing, marketing, STEM and supply chain.

In Maury County, the local CLARCOR Innovation Center is working with faculty and administrators at Mount Pleasant High School to produce job shadowing and internship opportunities aligned with Mount Pleasant High's STEAM initiatives. CLARCOR is a research and development center that focuses on filtration technology, and the center recently helped Mount Pleasant High secure a \$500,000 grant to establish an innovation lab and purchase powerful computers and other high-tech equipment for students enrolled in the school's mechatronics program.

Colleges and Universities in the Nashville Area

Middle Tennessee State University

Murfreesboro • mtsu.edu

Austin Peay State University

Clarksville • apsu.edu

Tennessee State University

Nashville • tnstate.edu

Vanderbilt University

Nashville • vanderbilt.edu

Belmont University

Nashville • belmont.edu

Lipscomb University

Nashville • lipscomb.edu

Bethel University

McKenzie • bethelu.edu

DeVry University

Nashville • devry.edu

Meharry Medical College

Nashville • home.mmc.edu

Williamson College

Franklin • williamsoncc.edu

American Baptist College

Nashville • abcnash.edu

Aquinas College

Nashville • aquinascollege.edu

Cumberland University

Lebanon • cumberland.edu

Fisk University

Nashville • fisk.edu

Welch College

Gallatin • welch.edu

Trevecca Nazarene University

Nashville • trevecca.edu

Columbia State Community College

Columbia and Franklin
columbiastate.edu/campuses/
williamson-campus

Nashville State Community College

Nashville • nscc.edu

Volunteer State Community College

Gallatin • volstate.edu

Tennessee College of Applied Technology

Dickson • tcatdickson.edu

Tennessee College of Applied Technology

Murfreesboro
tcatmurfreesboro.edu

Tennessee College of Applied Technology

Nashville • tcatnashville.edu

John A. Gupton College

Nashville • guptoncollege.edu

Remington College

Nashville
remingtoncollege.edu/
locations/nashville

Daymar Institute

Clarksville, Murfreesboro,
Nashville
daymarcollege.edu

Nossi College of Art

Madison • nossi.edu

Watkins College of Art Design & Film

Nashville • watkins.edu

Nashville Film Institute

Nashville • nfi.edu

Nashville School of Law

Nashville • nsl.law

South College Nashville

Nashville • south.edu

Strayer University

Nashville • strayer.edu

Western Governors University

Franklin • tennessee.wgu.edu



Inviting ECOSYSTEM

A collaborative and nurturing environment helps companies launch and grow

By Dorian Martin

Cool companies like the entrepreneurial climate in the Nashville area.

The region offers a wealth of resources that support startups. The region's desirability as a place to live draws both entrepreneurs and talent to make their companies successful.

While the region's entrepreneurial roots are in its legendary music scene, the Nashville area continues to diversify its economic portfolio. Nearly 30% of Nashville's economy is focused on health care. And thanks to the prime location, the area is rapidly expanding its presence in both the logistics and distribution industry and tourism and entertainment market.

The Nashville Entrepreneur Center's PreFlight program provides entrepreneurs with idea-stage startups with the resources and support they need to launch their businesses.



Nashville's livability has resulted in significant growth in its population. In fact, between 50 and 60 new residents move to the area every day. This influx provides many opportunities for enterprising entrepreneurs. That's where serial entrepreneur Mark Cleveland saw an opening – and took it.

Cleveland's new venture, Hytch, is dedicated to inspiring commuters to

change the way they view mobility. Driven by the desire to fight climate change and the Nashville area's growing traffic, the Hytch Rewards mobile app encourages individuals to share rides.

Hytch works with companies that pay their employees to use Hytch Rewards to share rides to work via carpool, vanpool, rideshare or mass transit. In addition, app

users anywhere in the country earn carbon offsets that Hytch buys and retires on the participant's behalf.

Hytch's rapid entry into the market has been supported by thought-leading organizations, such as CleanTech Alliance, Transit Insight and Middle Tennessee State University's Data Science Institute.

MTSU's Data Science Institute prepares students to succeed in the data world by giving them the opportunity to develop skills through data hackathons and real-world projects.



“There’s a lot of talent in Nashville,” says Cleveland, who was named the 2014 Nashville Entrepreneur of the Year by the Nashville Area Chamber of Commerce. “Ideas born here can change the world.”

From Lab to Market

The Nashville area’s 24 colleges and universities also serve as incubators for cutting-edge businesses, and many have active entrepreneur programs. In addition, these institutions offer a significant talent pipeline.

For example, Vanderbilt University’s labs provided the fertile soil that led to the creation of IQity. Chase Spurlock, IQity CEO and adjunct assistant professor at Vanderbilt, focused his work on immunology and used RNA to identify autoimmune diseases.

Spurlock founded IQity in 2015 to leverage this early learning. The company developed and commercialized three RNA blood tests to help doctors make more informed diagnoses and improve

outcomes. The company has now evolved to analyzing large population datasets, creating predictive models to find undetected, uncontrolled and misdiagnosed autoimmune diseases.

Spurlock believes the Nashville area has been the ideal location to start a business.

“We’ve had a lot of partners and mentors who have lent their expertise and given their talents,” he says. “I would say that one of the most important characteristics of this ecosystem is the willingness to give back.”

Entrepreneurial Ecosystem

Nashville area entrepreneurs can tap into a variety of services through groups such as the Nashville Business Incubation Center, SCORE, the Nashville Entrepreneur Center and Launch Tennessee. The network of individual entrepreneurs is also critical to supporting success through mentorship, problem-solving and celebration.

The Nashville Entrepreneur Center is developing a formal entrepreneurial ecosystem. The center strives to connect budding entrepreneurs with the more than 250 entrepreneur support assets in town. The center’s work is focused on making sure information, capital and connections flow freely, which is critical for entrepreneurs from various walks of life to start and grow their business.

“If you build this ecosystem where all this knowledge is housed and people can get to it regardless of their backgrounds or where they live in the city, you will grow your economy because people will stand up and say, ‘I want to be an entrepreneur,’” says Brynn Plummer, the center’s vice president of inclusion and community relations. “We’re going to get more cross-pollination and get more cross segments of society to come together. Everyone who has an amazing idea can work on that idea, regardless of who they are.”



The program has drawn talent from outside the region. Five of the 2019 participants live in Nashville, while five live in California, three in Georgia and one from New York City, Washington, D.C., and Vancouver, Canada.

A vibrant, stylized illustration of Nashville, Tennessee, featuring various icons like buildings, cars, a hot air balloon, a cat, and a person, all connected by a network of lines, symbolizing connectivity and livability.



Open Doors

A creative vibe and welcoming spirit set the Nashville area apart

By Cara Sanders

It seems that nearly every day a new statistic or ranking about the Nashville area is released — whether it's the Census Bureau's estimate of the number of people moving to the city each day or Livability.com's ranking of Nashville on its list of the 2019 Top 100 Best Places to Live in the country.

But what brings people to the Nashville area and why do they stay?

In 2018, international migration accounted for more than 22% of Nashville's net in-migration, and population growth among African American, Asian and Hispanic or Latino groups was well above the national and state averages.

Additionally, Tennessee has no state income tax, providing Nashville-area residents with a cost advantage that just isn't there in its "cool city" counterparts.

The Nashville "it factor" is a result of the dynamic communities built as a result of the large number of artists, creatives and entrepreneurs who have made the city home.

For many, like Brandon McIntosh, who recently moved to the region, the quintessentially cool vibe of the city was the main motivator for relocating to Nashville.

"I joke around a lot and say that I've never had a bad time in Nashville, but it's so true," says McIntosh, a loan specialist with Franklin Synergy Bank. "There is a certain feel — a certain vibe — that you just don't get living anywhere else."

For others, the decision to move to Nashville ultimately comes down to career opportunities afforded to young professionals.



Nashville Fashion Week is just one of the many events keeping area residents entertained.

Alynnna Tilley, a hairstylist with her own studio space at Salons by JC, moved here from Oregon nearly two years ago.

“Professionally, moving here opened so many doors for me that I would have never had the chance to experience,” says Tilley. “I’ve learned so much in such a short period of time both on the business and creative sides of my industry.”

That blend of creativity and technicality has established the Nashville area as an ideal location for entrepreneurs as well as business giants, like newcomers Amazon, software-based bookkeeping company Pilot.com and Mitsubishi.

“I love that you can truly make a living in the city – whatever you want or need it to be,” Tilley says. “There are so many people here chasing their dreams that it’s hard not to be inspired.”

Attracting talent is one thing but getting transplants to invest in their communities and stay is another. Fortunately, Nashville has figured out how to excel in both, and businesses are taking notice, too.

Sophie Mullin, a business development consultant with Jackson National, was relocated to the Nashville area from the company’s Denver office nearly

a year ago and hasn’t missed a beat when it comes to immersing herself in the culture.

“I love all of the concerts and live music venues around town,” says Mullin. “I’m a huge foodie, so I love that there are so many amazing restaurants, and even after living here for a year, my list of places to go to is still a mile long!”

Mullin, like many others, has taken a bite out of Nashville’s burgeoning food scene, which has put the city on the map as a popular foodie destination in recent years. With a slate of award-winning restaurants and chefs that have gained

MORE THAN
312,848
residents

MOVED TO THE
NASHVILLE AREA
BETWEEN 2010
AND 2018.

INTERNATIONAL
MIGRATION
ACCOUNTED FOR

22%

OF ALL NET
IN-MIGRATION
IN 2018.



national recognition, including the city's five semifinalist nominations for the James Beard Foundation's prestigious 2019 awards, the local flavor is off the charts.

And, of course, Nashville isn't called Music City for

"I've always loved the creative spirit of Nashville," Tilley says. "There is always something going on."

Beyond a vibrant downtown scene, Nashville provides newcomers with several

"I love that you can truly make a living in the city – whatever you want or need it to be. There are so many people here chasing their dreams that it's hard not to be inspired."

– Alynna Tilley, Hairstylist, Salons by JC

nothing. With 630 arts, culture and humanities organizations in the area and live music available at all hours of the day, it's easy to see why artists are attracted to the city.

distinctive communities to choose from, each with their own story to tell.

"Plan a trip and really explore the different neighborhoods. I'd be surprised if you didn't find at least one that makes you feel like you're in your element," McIntosh advises newcomers. "The list of things to do is unending, and whatever you choose, the city has a casual, welcoming feel that just makes everything comfortable."

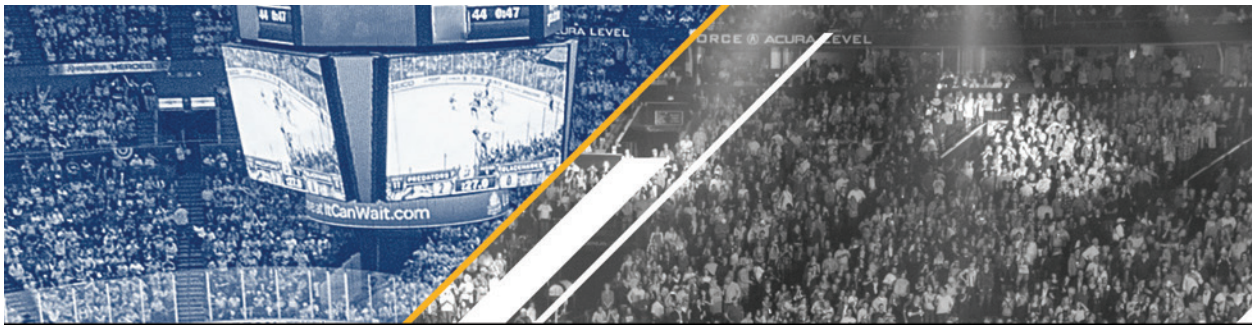
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PERFORMANCE
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630

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Sense of Community

The Nashville area offers a trove of inviting places to live

By Jessica Walker Boehm

Just past Music City's bright lights are several communities that have their own brand of amenities and advantages, including revitalized downtowns, cool attractions and picturesque parks, and they're only a short drive away from everything Nashville has to offer.

Here are a few communities that are just a hop, skip and a jump from Nashville, where residents can truly enjoy the best of all worlds.

Franklin

Franklin is no stranger to accolades. Located about 20 miles south of Nashville, the Williamson County community has been featured in *Southern Living*, *Garden & Gun* and *Travel + Leisure* – just to name a few top-rated publications – and it draws a wide range of residents, from young professionals to growing families to retirees.

Folks are attracted to Franklin's must-see downtown, for example, that has an award-winning Main Street lined with shops, restaurants and attractions, such as the revitalized Franklin Theatre. In addition, the city is steeped in history, home to sites like the Carter House, Lotz House



and Carnton Plantation, which memorialize the Civil War's Battle of Franklin.

Franklin also has a robust parks system with more than 900 acres of parkland, along with several outdoor destinations nearby, including Fairview's Bowie Nature Park.

Murfreesboro

Located about 35 miles southeast of Nashville, Rutherford County's Murfreesboro is a family-friendly community that's also one of the fastest-growing cities in Tennessee, and it's easy to see why.

Murfreesboro, which scored the No. 19 spot on *Money* magazine's list of Best Places to Live in America in 2018, has a cost of living that's 9% below the national average. It is home to Middle Tennessee State University and its 23,000 students.

Plus, Murfreesboro has a thriving downtown with plenty of fun things to do as well as an expansive parks and greenway system and ample opportunities for sports and recreation, with six public golf courses and the largest indoor rock climbing gym in the state.

"From breweries to shopping to a Civil War battlefield, Rutherford County offers Southern charm with a progressive attitude," says Barbara Wolke, senior vice president for the Rutherford County Convention and Visitors Bureau.



Nashville-area residents have access to a plethora of activities, from (clockwise) shows at the Franklin Theatre to educational programs at MTSU to rock climbing at Climb Murfreesboro to wine at Frothy Monkey coffeehouse.



Columbia

Named one of The South's Best Small Towns by *Southern Living* magazine in 2019, Maury County's Columbia offers a respite from Nashville's hustle and bustle while still offering easy access to Music City, as it's less than an hour's drive away.



“My husband and I love the Columbia Farmers Fresh Market on Saturday mornings and getting to catch up with our local farmers.”

- Susan Leach, Owner, Needle & Grain

There's plenty of charm thanks to its historic town square that's filled with locally owned shops and dining spots as well as a thriving arts district that features a number of locally produced public works.

“My husband and I love the Columbia Farmers Fresh Market on Saturday mornings and getting to catch up with our local farmers,” says Susan Leach, who owns Needle & Grain general store in downtown Columbia with her husband, Bryson Leach. “We also love eating at local restaurants, including The Dotted Lime, Los Potros Authentic Mexican Food and Sweet Bakes Donuts & Cakes.”



Dickson

Looking for a quaint, quiet community to call home? Consider Dickson, situated approximately 40 miles west of Nashville and home to fewer than 15,000 residents.

Locals enjoy getting active at outdoor havens like Montgomery Bell State Park, and there's always entertainment on deck at the Renaissance Center, where community theater troupe The Renaissance Players takes the stage for plays and musicals throughout the year.

Dickson also offers several opportunities for the tight-knit community to come together, with special events, such as Old Timers Day, which has taken place for more than 60 years. Held in downtown Dickson the first Saturday in May, Old Timers Day celebrates Dickson County's heritage with a parade, live music, food vendors and other family-friendly activities.

The Nashville area has activities for everyone to enjoy, from hiking and fishing to walking and listening to local music.



Hendersonville

Hendersonville, the largest city in Sumner County, is less than 20 miles north of Nashville – close enough for a quick commute, but far enough away to offer an experience that's all its own.

The community is situated on Old Hickory Lake, making it a favorite spot to cool off during the summer season, and it's packed with parks and outdoor athletic facilities. Hendersonville has several miles of paved walking and biking trails, too, creating a large greenway system that's still growing.

Shopping, dining and entertainment are also readily available in Hendersonville, particularly at The Streets of Indian Lake. In addition to retailers and restaurants, the complex has a movie theater and hosts a summer concert series and the Hendersonville Mid-Week Farmers Market.



Best IN THE GAME

Sports are helping Music City expand its tourism appeal

By Cary Estes

Music City tourism hit a high note during the weekend of April 26-28, 2019. More than a dozen major events – led by the immensely popular NFL Draft – took place in Nashville across those three days, drawing total crowds that numbered in the hundreds of thousands.

It was the latest milepost in a decade of steady growth for Nashville's leisure and hospitality industry. Thanks in large part to a myriad of festivals, concerts and sporting events, the number of annual visitors to Nashville has increased by 62% since 2009 (to 15.2 million), and the amount of annual visitor spending has nearly doubled (to more than \$6.5 billion).

As a result, Nashville's hotel occupancy rate has grown faster over the past five years than any other top-30 city in the country. To stay ahead of this increasing demand, the city began 2019 with approximately 15,000 new hotel

rooms in the construction or planning phases.

In addition, 133 new restaurants/bars/café's opened in 2018, compared to 90 just two years earlier. The industry's economic impact includes approximately 70,000 jobs, \$1.65 billion in worker paychecks and \$495 million in state and local taxes.

And that visitor growth is not just in Nashville. A record 1.72 million visitors came to Williamson County in 2018, a 13.6% increase from the prior year. It marks the fourth consecutive year that the county outpaced the national average for tourism growth, which in 2018 was only 1.9% across the nation.

Fan-tastic Experience

Music, of course, has long been Nashville's major tourism attraction, dating to the origins of the Grand Ole Opry nearly a century ago. But the playing field has been expanded more recently to include a wide world of sports. These range from regular games involving the NFL's Tennessee Titans, NHL's Nashville Predators, MiLB's Nashville Sounds (and the upcoming MLS Nashville Soccer Club) to annual and special events,



2019 NFL Draft



PHOTO: NASHVILLE CONVENTION & VISITORS CORP.



such as the NFL Draft, NHL All-Star Game, SEC Basketball Tournament, Music City Bowl and St. Jude Rock 'n' Roll Nashville Marathon.

“We’ve worked hard at becoming a true sports destination by using our

Economic Impact of Toursim in the Nashville MSA

(2017, percent change from 2016)

Direct Visitor Spending:

\$6.50 billion

▸ 8.5% change

Jobs:

68,320

▸ 5% change

Worker/income paychecks:

\$1.65 billion

▸ 9.3% change

State and local taxes:

\$495 million

▸ 7% change

Source: Nashville Convention & Visitors Corp

assets as Music City,” says Scott Ramsey, president and CEO of the Nashville Sports Council. “We’ve engaged entertainers and the whole downtown music scene to give us an advantage. So when you come for a sporting event, you also have other entertainment options like concerts and festivals.

“We have a city where the entertainment and sports scenes are well blended and supported on both sides. Our professional teams support the music industry, and the entertainers support our major sporting events. That’s something we’ve been able to capitalize on.”

In fact, Ramsey says the rapid rise in the city’s sports tourism came about largely because of the entertainment and hospitality infrastructure that already was in place downtown when both Nissan

Stadium and Bridgestone Arena were constructed in the latter half of the 1990s. So fans can easily walk from hotels to restaurants and bars and then to the game, while streets can be blocked off for events and concerts held in conjunction.

“Our downtown serves as a perfect campus for these large events, where there are not a lot of transportation needs for the fans,” Ramsey says. “We have that naturally set up here without artificially creating it, and we’ve been able to play to that. That’s one of the things we’ve promoted

as a host site for these major bids. It’s resonated well with people.”

Sports also has enabled Nashville to create some excitement during times of the year that used to be lackluster in terms of tourism. For example, Ramsey says the week between Christmas and New Year’s Day traditionally was the slowest of the year for hotel occupancy. But now there are several events that week, including the Music City Bowl football game and a Predators and/or Titans game, that can be tied into New Year’s Eve celebrations.

“By linking up these events, we’ve taken what was the slowest week of the year and used sports as the anchor to build a tourism destination for three or four days,” Ramsey says. “Now that week is one of the two or three busiest of the year. There have been other times of the year we needed to build out, which is why we went for the NHL All-Star Game in late January and the SEC Basketball Tournament in mid-March. We’ve been strategic about the times of year we go after events to make sure they fit into the overall tourism calendar.”

Let’s Have Some Fun

The Nashville area celebrates its heritage, musical roots and culture with a slate of festivals that take place throughout the year. Here’s just a sample:

AMERICANAFEST®

A festival and conference for artists, fans and industry leaders, this event, held every September, is spread over 50 different music venues across Nashville and includes nightly showcases, special events highlighting the city’s culture, music industry panels and the Americana Honors & Awards.

CMA Fest

Every June, visitors from around the world flock to Nashville to meet some of country music’s biggest names and up-and-comers, then listen to the musicians in concert. There are big shows at Nissan Stadium, and free street performances occur around town.

Nashville Film Festival

Held in October, this annual event includes hundreds of the world’s best new films screened over 10 days, filmmaker Q&As, panels and more.



Southern Festival of Books

About 200 local, regional and national authors come to Nashville every mid-October to present readings, signings and panel discussions for thousands of book devotees. Admission is free.

Main Street Festival

The Heritage Foundation of Williamson County has presented an annual Main Street Festival in historic downtown Franklin since the early 1980s. The late April two-day event draws about 100,000 for a weekend of live music, arts and crafts and food vendors.

Uncle Dave Macon Days

Old-time music and dance arrives in

Murfreesboro every July at the Uncle Dave Macon Days bluegrass festival at Cannonsburgh Village in Rutherford County. Admission is \$10 for the two-day event that features competitions in clogging, buck dancing, banjo and bluegrass bands as well as a variety of food and craft vendors.

Mule Day

Mule Day is an annual event in Columbia that recognizes the area’s rich agricultural history. The four-day Maury County festival attracts more than 200,000 people. In addition to mules, there is traditional Appalachian food, music, dancing and crafts, and the main highlight is a Mule Day Parade.

Residents can get their music and sports fix by attending events like CMA Fest (right) or catching one of Nashville’s soccer or baseball games (left).



High Flyer

An ambitious \$1.2 billion expansion program is taking Nashville's airport to new heights

By Emily Handy

It seems like the sky's the limit for Nashville International Airport (BNA) these days.

Headed up by President and CEO Doug Kreulen, the huge \$1.2 billion expansion project, dubbed BNA Vision, is now well underway. New parking garages, an attached airport hotel, dozens of new, local dining and retail options, and an International Arrivals Facility (IAF) are just some of the plan's highlights.

The entire ambitious project is slated to be completed by the end of 2023. Already opened is a six-level terminal parking garage, serving travelers with 2,200 covered spaces next to the Short Term Garage. A 64,000-square-

foot airport administration building and additional parking garage is set to open in 2020, along with an expanded and improved Concourse D, ticketing lobby and baggage claim. An on-site hotel will open its doors in 2023.

Late 2023 will see the completion of a state-of-the-art IAF to replace the current Interim International Arrivals Building.

While airport guests and Nashville-area residents are excited about the entire expansion and its economic impact on Middle Tennessee, the opening of several local restaurants and the IAF attracting more international flights have the region truly buzzing.

An impressive array of Nashville's signature restaurants are in the

works to open airport outposts, including Peg Leg Porker, Puckett's, Hattie B's, Prince's, Tennessee Brew Works and The Grilled Cheeserie. Early morning travelers will get their caffeine fix with the arrival of local coffee favorites like Bongo Java and Barista Parlor. The first batch of new restaurants and retail shops are slated to open by the end of 2019, with more to follow as the expansion continues.

Meanwhile, BNA is poised to become an international travel hub with the anticipated opening of the IAF facility and on-site hotel. Nashville nabbed a direct flight to London on British Airways in 2018, and direct flights elsewhere in Europe and Asia are now being eyed.



“We knew
we wanted
to create
a more
authentic
Nashville
experience
for our
travelers.”

-Doug Kreulen,
President and CEO
of Nashville
International Airport

Kreulen joined the Metropolitan Nashville Airport Authority (MNAA), operator of BNA, in 2012 and served as its chief operating officer before being named president and CEO in December 2017. Before joining MNAA, Kreulen served four years as director of operations for Huntsville International Airport. He was a 27-year career Air Force officer whose assignments included vice commander of the 374th Airlift Wing at Yokota Air Base in Japan and chief of staff for the U.S. Air Force Academy in Colorado Springs.

Q: What parts of the airport expansion plan are you most excited about?

A: There are many exciting projects, but what I'm looking forward to the most is cutting that big ribbon in 2023 at the completion of BNA Vision. This will include the opening of our new terminal lobby, security checkpoint, marketplace and IAF.

Q: Which part of the plan do you believe is most anticipated by travelers?

A: Probably the terminal lobby. It will be a true showstopper. I know our passengers are also excited about all the new local concessions opening in the near future.

Q: How did you go about choosing the new food and beverage options?

A: We knew we wanted to create a more authentic Nashville experience for our travelers. With that goal in mind, Fraport, our new concessions development and management company, spent months on planning, recruiting and outreach, including the review of more than 430 request-for-proposal responses, to select and create an outstanding concessions

program for BNA. We are committed to delivering a concessions program that features a diverse array of local operators who showcase the best of our city and region. From the moment our guests enter the terminal or step foot off the plane, they will experience the sights, sounds and flavors that make Music City so distinctive.

Q: How are you prepared to continue to grow the airport, along with the booming growth of Nashville?

A: Though we are currently in the midst of a \$1.2 billion expansion, we are planning for what comes after the completion of BNA Vision in 2023. Future projects will include extending a runway, growing the terminal from 48 gates to 60 gates, with the build-out of Concourse A and a possible satellite terminal.

Q: Are plans still in the works to eventually accommodate a future light rail service or mass transportation option?

A: Yes, the terminal garage that is currently under construction is being built to accommodate any future light rail or mass transit the city of Nashville may decide to invest in.

Nashville International Airport By The Numbers

15

Airlines Serving
the Airport

67.4K

Jobs from Direct,
Induced and
Indirect impacts

576

Daily Flights

\$7.1B

Total Economic
Impact in 2018

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Ideal Location

THE REGION RIDES ON A SET OF LOGISTICS ADVANTAGES

A key advantage for Nashville area businesses is the city's central location. Nashville is within a day's drive of 50% of the U.S. population, and BNA multiplies that reach with 576 average daily flights and 74 nonstop destinations. Companies such as GM, Nissan, Under Armour, Amazon, Lowe's, Macy's and Saks rely on the region's robust transportation and logistics network.

"We're very centrally located, which is not only important to distribution logistics companies, but also to corporate headquarters who need to get to their clients in a very efficient manner," says Courtney Ross, chief economic development officer for the Nashville Area Chamber of Commerce. "We have a great airport, a great interstate system and desirable location. It is a huge advantage of time savings to corporate headquarters that need to be located near their U.S. markets."

The Nashville area's Midsouth location at the crossing of three major interstates makes it attractive for distribution,

logistics and supply chain operations to operate in the region. Interstate 65 connects Nashville with Louisville, Indianapolis and Chicago to the north and Birmingham, and Montgomery and Mobile to the south, while the highly traveled east-west Interstate 40 connects the Nashville area to markets from North Carolina to California. Interstate 24 runs northwest to southeast and provides convenient travel to metropolitan areas, including St. Louis, Chattanooga and Atlanta.

In addition, distribution companies in the Nashville area have access to air, water and rail assets, a major factor why the logistics and trade chain sector makes up one of the largest segments of the region's economy, with more than 84,000 jobs.

About 50% of the U.S. population lives within 650 miles of Nashville, and the region can offer one- and two-day truck delivery times to more than 75% of all U.S. markets.

– Kevin Litwin





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Advanced manufacturing supports over
84,400 jobs in the Nashville area.

INDUSTRIAL STRENGTH

The advanced manufacturing industry supports over 84,000 jobs in the Nashville area

By Kevin Litwin

From cars to boats and military equipment to appliances, computers and food products, the Nashville area has built a robust advanced manufacturing sector that leverages the region's skilled workforce, technical resources, location advantage and lower cost of doing business.

Advanced manufacturing supports more than 84,400 jobs in the region, including more than 34,000 created since 2010, and delivers an annual economic impact of \$9.5 billion. Some of the world's most recognized manufacturers have operations in the region, including A.O. Smith, Bridgestone Americas, Dell, Electrolux, GM and Nissan. The presence of two major auto assembly operations in Maury County and Rutherford County have also helped drive large investments from Tier I and Tier II suppliers.

Recent advanced manufacturing successes in Middle Tennessee include electroplating manufacturer Advanced Plating expanding into a 115,000-square-foot building in Portland and creating 200 jobs in Sumner County. Automotive supplier Truform Manufacturing is undergoing a \$14 million expansion, its third since 2012, and adding 90 jobs in Dickson County.

In Robertson County, family-owned Tate Ornamental, which produces ornamental metal, architectural millwork and stonework for hospitality venues, corporate

offices, shopping centers, museums and government buildings, is investing \$6 million to expand its operations and create 60 jobs.

The region's advanced manufacturing sector continues to attract investment from outside the Nashville area. San Francisco-based pet food maker NomNomNow selected Nashville for a production facility that will create 180 jobs. The location will allow the company to better serve its customers in the eastern half of the country.

"Our new facility enables us to provide a more flexible experience for all customers," says Lynn Hubbard, Nashville general manager for NomNomNow. "We are bringing together custom technology with a unique, team-centric, high performing workforce committed to caring for the pets we serve."

Efficient Manufacturing

Gallatin, a community in Sumner County, has benefitted from the growth in advanced manufacturing in the region. The city has added 4,000 jobs in the last five years in the manufacturing, distribution

and medical sectors. A recent arrival is Axem Distributing, a firearm components manufacturer that moved its corporate offices from California to Gallatin, where it occupies a 40,000-square-foot facility to make parts for firearms. The move put the company close to Italian gunmaker Beretta's manufacturing plant in Gallatin.

"Axem is a fully automated company with machinery that runs 24 hours a day, so their 17 employees put out the same amount of product as their closest competitor that has 93 employees," says James Fenton, executive director of the Gallatin Economic Development Agency. "Attracting Axem to Gallatin now gives us 90 manufacturers."

Fenton says several manufacturing companies are expanding in Gallatin.

"Companies like Axem are ideal for us to attract," he says. "It's a high-tech firm with a small workforce that utilizes much automation in their manufacturing process."

'Goldilocks Community'

Maury County is home to a GM assembly operation, which has drawn investment from a number of automotive suppliers. France-based Faurecia Interior Systems



Schneider Electric's new regional headquarters provides employees with open office space.

is creating 143 jobs to manufacture auto parts in Spring Hill, and Japan-based Fuel Total Systems will create 150 jobs in Mount Pleasant to build fuel tank systems.

"Many people don't realize that Maury County is a part of the Nashville MSA, but working with Nashville economic officials has been very advantageous when marketing ourselves to manufacturers looking to settle in Middle Tennessee," says Travis Groth, vice president of economic development for the Maury County Chamber & Economic Alliance. "It's been especially important for us going after foreign investment projects, informing companies that we are right on I-65 and only an hour from both Nashville International Airport and downtown Nashville."

Groth says a low cost of living in Maury County makes great sense for manufacturing projects, and Maury County has several industrial parks that can absorb

further growth at a reasonable price point.

Maury County received a \$1 million grant from the Tennessee Department of Economic and Community Development to develop a 200-acre, rail-served site in Columbia. In addition, the Industrial Development Board of Maury County has purchased 300 acres near Rippavilla Plantation in Spring Hill for campus-style light industrial and R&D office-type projects.

Groth adds that Maury County is also constructing another 50,000-square-foot spec building, its second. The first one sold within six months.

"Maury County is like a Goldilocks community – not too big, not too small, but just right," he says. "We have a unique community feel all our own while still being a part of the Nashville MSA."



Calvin Bond works on changing an oil pan during an automotive technology class.

Major Manufacturing Companies in the Nashville Area

(Number of employees)

NISSAN	SCHNEIDER ELECTRIC
10,750	1,416
GM	HANKOOK TIRE AMERICA CORP.
3,800	1,200
BRIDGESTONE AMERICAS	TRANE CO.
3,539	1,100
ELECTROLUX HOME PRODUCTS NORTH AMERICA	UNIPRES USA
3,200	1,062
A.O. SMITH	GENERAL MILLS
2,456	1,028
TYSON FOODS	ADIENT
1,600	1,000
DELL	
1,500	

Source: Nashville Area Chamber of Commerce

PHOTOS: JEFF ADKINS



GM employs 3,800 people in the Nashville Area.

Photo by Jeff Adkins

INTERNATIONAL *Flavor*

The Nashville area's location, business environment and culture are a draw for companies across the globe

By Patsy B. Weiler

Through its roots in music, Nashville has played on a global stage for decades. Now, with increasing frequency, the world is finding its way to the region thanks to investment from foreign-owned companies.

View this playlist of success: More than 342 foreign-owned companies have operations in the Nashville area that employ over 51,000 workers.

A 2018 study by the Brookings Institution shows the 300 largest metro areas account for 36% of global employment growth, and Nashville comes in at No. 41 in the world's ranking of these cities, placing it ahead of London, Atlanta, Tokyo and Boston.

Foreign direct investment (FDI) by international companies has given the 10-county Nashville area a significant boost since 2001. Nearly 300 internationally owned business relocations and expansions have occurred in the region, creating almost 40,000 new jobs.

The Nashville area has a long history with FDI, with Japanese automaker Nissan and tire manufacturer Bridgestone Americas' presence in the region for decades. In addition to manufacturing operations in Rutherford County, Nissan maintains its North American headquarters in Franklin, and Bridgestone Americas has its headquarters in downtown Nashville.


About 50 miles north of Nashville, Korean electronics manufacturer LG has opened a state-of-the-art manufacturing operation in Clarksville to produce washing machines.

The company expects to hire more than 600 workers there. South Korean tire manufacturer Hankook Tire America Corp. opened

an \$800 million manufacturing operation in Clarksville in 2017. The company opened its North American headquarters in Nashville after locating manufacturing in Clarksville.

The region appeals to FDI for many reasons, including an educated labor force, a low tax burden, lower overall costs and a central location within a day's drive of half of the U.S. population, says Jeff Overby, professor and director of Belmont University's Center for International Business.

"The Nashville brand is becoming known around the world. I travel a great deal internationally, and people everywhere I go know about Nashville," Overby says. "Gaining direct international flights, such as the recently added London-Nashville flight by British Airways, will certainly increase awareness of the city and region."



Bridgestone Americas settled in Nashville in 1992 and added Bridgestone Tower, which houses over 1,700 teammates and contractors, and Bridgestone Operations Center in 2017.



Companies like Nissan and Bridgestone Americas are boosting the region's economy while also employing area residents.

“The success of these early international movers demonstrates to other international firms the attractiveness of the Nashville marketplace.”

– Jeff Overby, Professor and Director,
Belmont University's Center for International Business

The Nashville Area Chamber of Commerce has made a strong commitment to attract and recruit companies. The chamber's International Business Council (IBC) Advisory Board represents a cross section of the region's international business community.

Ranging from foreign-owned companies to Nashville-based companies operating around the world to universities and global service providers, the IBC advocates for and advises companies seeking to operate in Middle Tennessee.

“Nashville offers a unique combination of its central location within the U.S. as a transportation hub, its friendly, welcoming culture, mutual benefiting partnerships and ease of doing business between business and government, plus a great quality of life as compared to other places,” says Mike Fedeles, vice president and general manager at Mitsui & Co. in Nashville and chair of the International Business Council Advisory Board.

Figures from the Nashville Chamber show Japanese companies account for 35.8% of FDI employment in the region followed by Germany, the United Kingdom and Canada.

Nissan is the king of the road of this group. Since its groundbreaking in



342

FOREIGN-OWNED COMPANIES
IN THE NASHVILLE AREA

51K

EMPLOYED BY FOREIGN-OWNED
COMPANIES IN THE
NASHVILLE AREA

45%

OF TOTAL 2018 NEW JOB
COMMITMENTS IN THE
NASHVILLE AREA WERE FROM
FOREIGN-OWNED COMPANIES



1981, Nissan has invested \$8.1 billion in manufacturing plants in the Volunteer State and provided 10,750 manufacturing jobs.

In summer 2019, Mitsubishi announced it was relocating its North American headquarters from California to Franklin to be closer to Nissan. The automaker is part of a global alliance with Nissan and Renault that seeks to align the companies to boost development and facilitate cost savings. The move will create 200 new jobs.

“The success of these early international movers demonstrates to other international firms the attractiveness of the Nashville marketplace,” Overby says.

FOREIGN DIRECT INVESTMENT IN THE NASHVILLE AREA

JAPAN

Locations: 69
Employees: 17,659
% of Employees: 35.8%

FRANCE

Locations: 27
Employees: 2,550
% of Employees: 5.2%

IRELAND

Locations: 9
Employees: 1,561
% of Employees: 3.2%

UNITED KINGDOM

Locations: 39
Employees: 3,532
% of Employees: 7.2%

CANADA

Locations: 26
Employees: 2,948
% of Employees: 6%

ALL OTHERS

Locations: 111
Employees: 14,801
% of Employees: 30%

GERMANY

Locations: 28
Employees: 3,630
% of Employees: 7.4%

SWITZERLAND

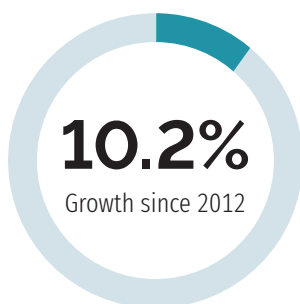
Locations: 18
Employees: 2,706
% of Employees: 5.5%

ECONOMIC PROFILE

POPULATION (2018)

2,042,167

Nashville Economic Market



POPULATION PROJECTION

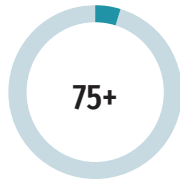
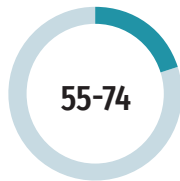
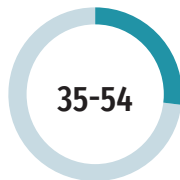
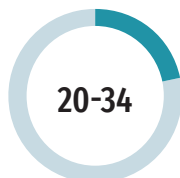
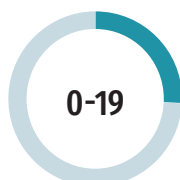
2015: 1,830,298

2040: 2,526,822

“(Nashville is) vibrant, it’s got tremendous culture, tremendous vitality, and that’s what’s attracting the talent pool, which is attracting the companies to move here.”

Courtney Ross, Nashville Area Chamber of Commerce

POPULATION BY AGE



POPULATION GROWTH

(2018 POPULATION/GROWTH SINCE 2012)

Cheatham County:	39,340/ 2.8%
Davidson County:	692,587/ 4.9%
Dickson County:	53,446/ 6.6%
Maury County:	94,340/ 12.9%
Montgomery County:	205,950/ 11.8%
Robertson County:	71,012/ 5.2%
Rutherford County:	324,890/ 15.7%
Sumner County:	187,149/ 10.7%
Williamson County:	231,729/ 17.2%
Wilson County:	140,625/ 14.7%

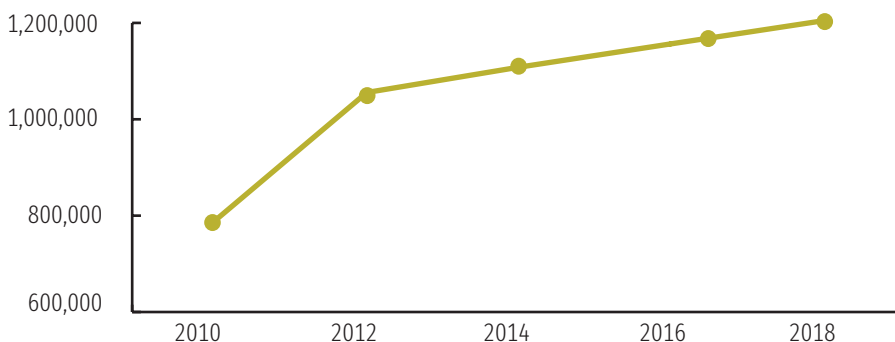
MEDIAN HOUSEHOLD INCOME



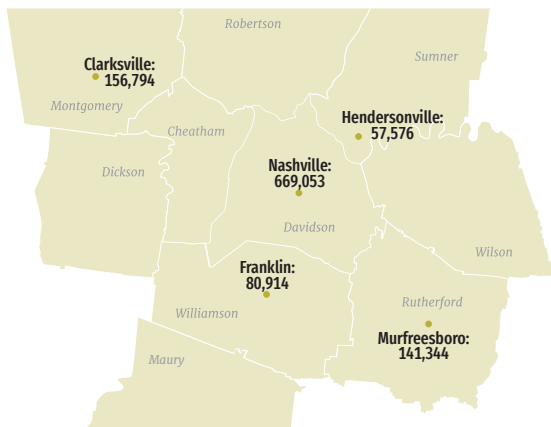
MEDIAN: \$63,939

\$0-\$34,999	24.6%
\$35K-\$74,999	33.6%
\$75K-\$149,999	29.3%
\$150,000+	12.5%

NONAGRICULTURAL EMPLOYMENT



MAJOR MSA POPULATION CENTERS (2018)



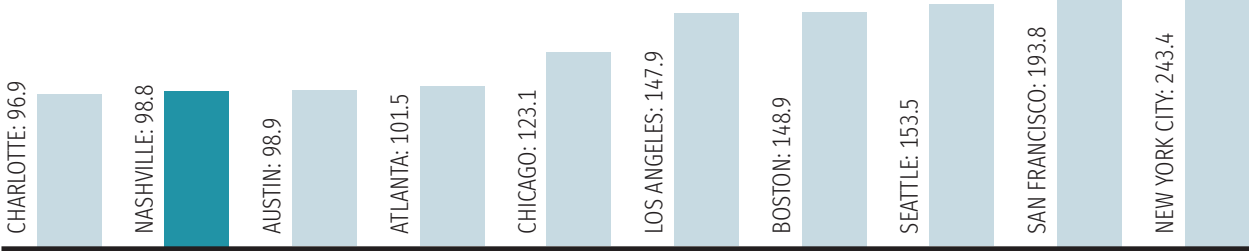
LABOR FORCE BY SECTOR (% OF NONFARM JOBS)

52.1% Service Providing	9% Education/Health Services	6.8% Leisure & Hospitality
10% Professional & Business Services	7.3% Goods Producing	3.9% Financial Activities
	7% Government	1.4% Information

BUSINESS ESTABLISHMENTS

Manufacturing	1,503
Education, arts, entertainment and recreation	1,866
Real estate, rental and leasing	2,017
Finance, insurance and real estate	3,159
Construction	3,290
Transportation, warehousing and wholesale trade	3,306
Accommodation and food services	4,055
Miscellaneous services	4,444
Health care and social assistance	4,717
Retail trade	6,096
Management, information, administration, professional and technical services	8,286
Total	42,739

COST OF LIVING



Sources: C2ER, 2018 annual, Nashville Area Chamber of Commerce, U.S. Bureau of Labor Statistics

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"Spring Hill remains a hot regional destination for new residents due to its high-ranked schools, quality of life and affordable housing. It's where business is ripe to thrive."

-Kayce Williams,
Economic Development Coordinator
City of Spring Hill



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