

An aerial night view of the Nashville skyline. The text "WELCOME TO NASHVILLE" is overlaid in large, white, sans-serif capital letters, centered horizontally and partially enclosed by two horizontal white lines. The background shows the city lights and the prominent AT&T Building with its illuminated spires against a twilight sky.

WELCOME TO NASHVILLE





Ralph Schulz

President and CEO
Nashville Area Chamber of Commerce

MANAGING GROWTH

Addressing the Needs for a Growing Population

- Regional transit initiatives
- Global connectivity
- Ensuring cost-of-living advantages
- Health and wellness initiatives
- Supporting Nashville quality of life including professional sports, the arts, greenways, parks, and other unique assets
- Promoting the creative class and music brand

An aerial photograph of the Nashville skyline at sunset. The sky is filled with soft, orange and pink clouds. In the center, a tall skyscraper is under construction, with a crane visible at the top. To the right, the AT&T Building is prominent. Other buildings with logos like Sheraton, Regions, and SunTrust are visible. The foreground shows a mix of urban buildings and parking lots.

KATE CHINN
SR. VP, INVESTOR RELATIONS

NASHVILLE AREA CHAMBER OF COMMERCE



THE WALL STREET JOURNAL.

Nashville Is Thrown by Unbridled Boom

TIMOTHY K SMITH Staff Reporter of THE WALL STREET JOURNAL

Wall Street Journal (1923 - Current file); Feb 7, 1989;

ProQuest Historical Newspapers The Wall Street Journal (1889 - 1993)

pg. A2

Nashville Is Thrown by Unbridled Boom

Overbuilding, Lack of Planning Lead to a Contraction

By TIMOTHY K. SMITH

Staff Reporter of THE WALL STREET JOURNAL

"In Nashville we have a built-in barometer" of the economic climate, local real-estate developer Bobby Matthews says. "During hard times we sell more Bibles."

So how are sales running at Thomas Nelson Inc., a big Bible publisher over on Elm Hill Pike? "Up over last year, in the 5% to 7% range," a spokesman says.

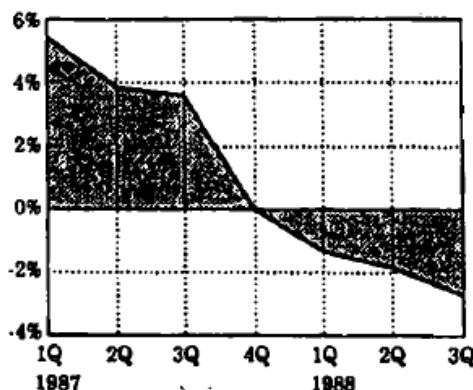
Hard times, or at least moderately uncomfortable times, have come to Nashville with remarkable swiftness. Only two years ago Tennessee's capital city was in full bloom, blessed by kismet and General Motors Corp., enjoying an influx of dollars and jobs. The community's biggest worry was the prospect of becoming another messy metropolis—becoming, as many residents put it at the time, "another Atlanta."

Nashvillians can stop worrying.

"In the future, Nashville may prove to be a good case study on how fast a city's economic prospects can change due to speculative over-building," concludes a study by the Georgia State University Eco-

Nashville's Wage Blues

Year-to-year percentage changes in total wage and salary employees



Source: Georgia State University Economic Forecasting Center

which had an exogenous shock forced upon it, Nashville's problems are endogenous."

Or, as Nelson Andrews puts it, "We didn't really do the planning job that we knew we should." Mr. Andrews, chairman of Brookside Properties Inc., a developer of residential real estate, says Nashvillians

nies sit back and light up a cigar."

He and many others say that while Nashville was enjoying its stogie, real-estate speculators from outside Tennessee crowded into the market all at once, leading to the current glutted condition. Asked how many out-of-state developers are operating in Nashville, a Chamber of Commerce spokesman says "We haven't had time to count them. There are dozens and dozens, particularly from the oil patch—Texas and Louisiana."

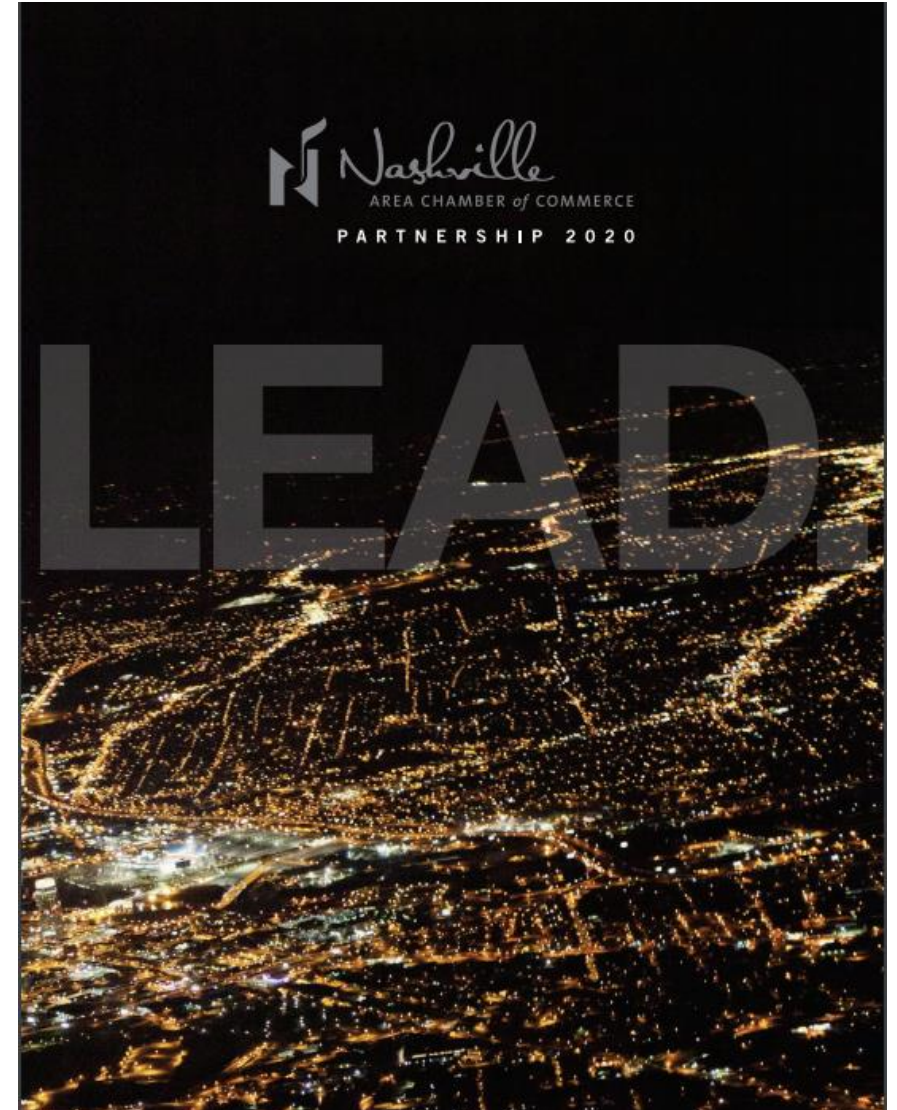
Not all of Nashville's problems stem directly from real estate. A local Textron Inc. unit, having completed a contract for B-1 bomber wings, recently laid off more than 3,000 employees. The Saturn plant hasn't pumped money into the economy as quickly as some people had supposed it would. The government's gargantuan superconducting supercollider project, for which the Nashville area was considered, went to Texas instead. The Nashville symphony went bankrupt for a while.

But nearly everyone agrees that the core of the current problem is uncontrolled growth, and many say that gaining control won't be any easier now than it was in

PARTNERSHIP 2020 TODAY

Since 1990:

- **880+ new companies** relocated
- **425,000+ new jobs** created
- **150% increase** in per capita income
- **185% population** growth



PARTNERSHIP 2020 CURRENT METRICS

Partnership 2020 Goals	2016	2016-2017	2016-2021	
	Baseline Year	One Year Change	Five Year Goal	% of Five Year Goal Achieved
Employment growth	970,585	+31,437	+100,000	31.4%
Percentage of adults with a college degree	41.9%	+1.3%	49.0%	18.3%
Gross Metropolitan Product	\$115.3 billion	+\$6.8 billion	\$144.1 billion	23.5%
Net Migration	25,358	+27,500	+140,000	19.7%
Median Household Income	\$61,522	+\$3,383	\$78,000	20.5%

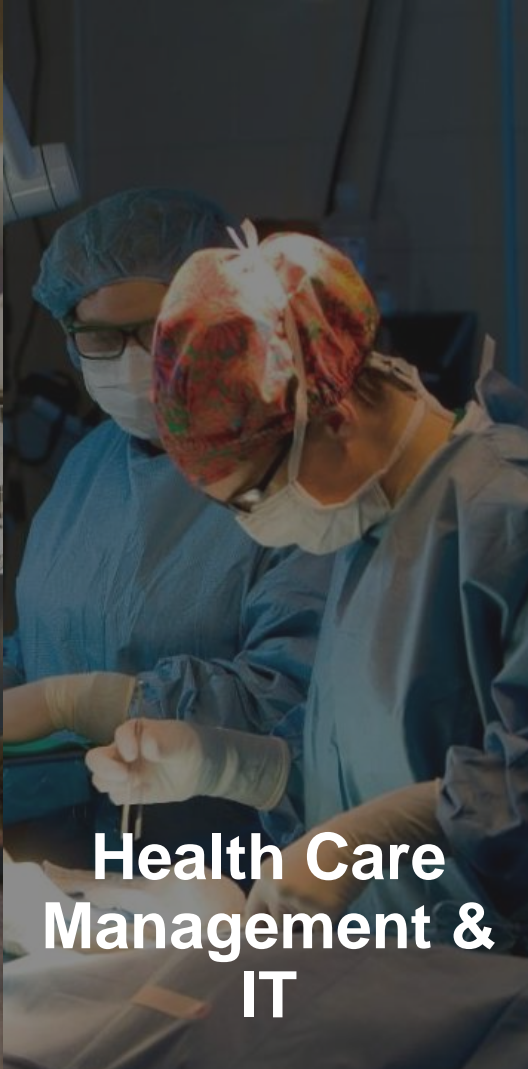
PARTNERSHIP 2020 STRATEGIC DRIVERS



PARTNERSHIP 2020 TARGET SECTORS



**Corporate
Services**



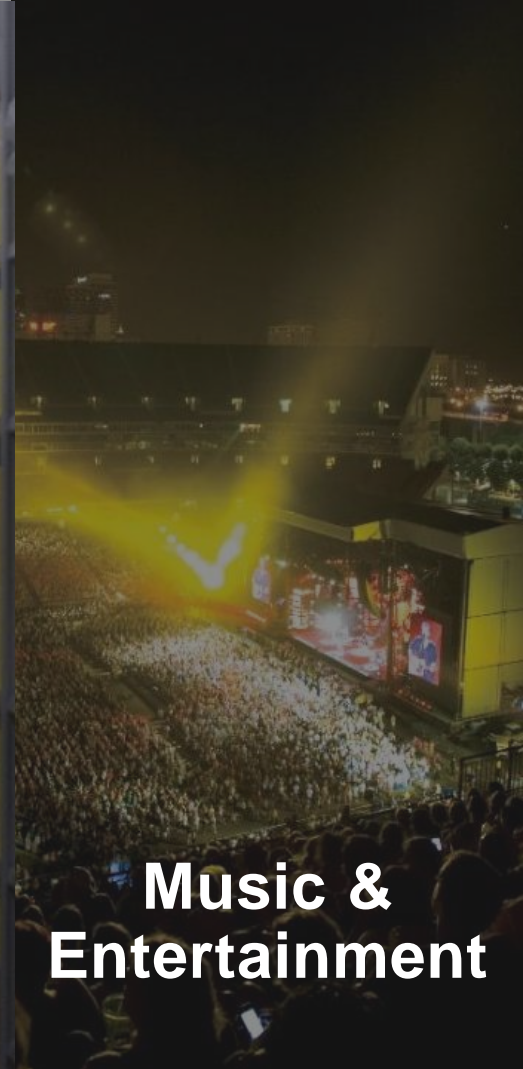
**Health Care
Management &
IT**



**Advanced
Manufacturing**



**Distribution &
Trade**



**Music &
Entertainment**

An aerial photograph of the Nashville skyline at sunset. The sky is filled with soft, orange and pink clouds. In the center, a tall building is under construction, with a crane visible at the top. To the right, the AT&T Building is prominent. Other buildings with logos like Sheraton, Regions, and SunTrust are visible. The text is overlaid in white, bold, sans-serif font.

COURTNEY ROSS

CHIEF ECONOMIC DEVELOPMENT OFFICER

NASHVILLE AREA CHAMBER OF COMMERCE









NASHVILLE IN 2017

1.86 million MSA population

6 Fortune 100 companies

\$38.8B health care industry

40,000 technology jobs

2 major automotive assembly plants

35.1 million sq ft office space

172.8 million sq ft industrial space

124 live music venues

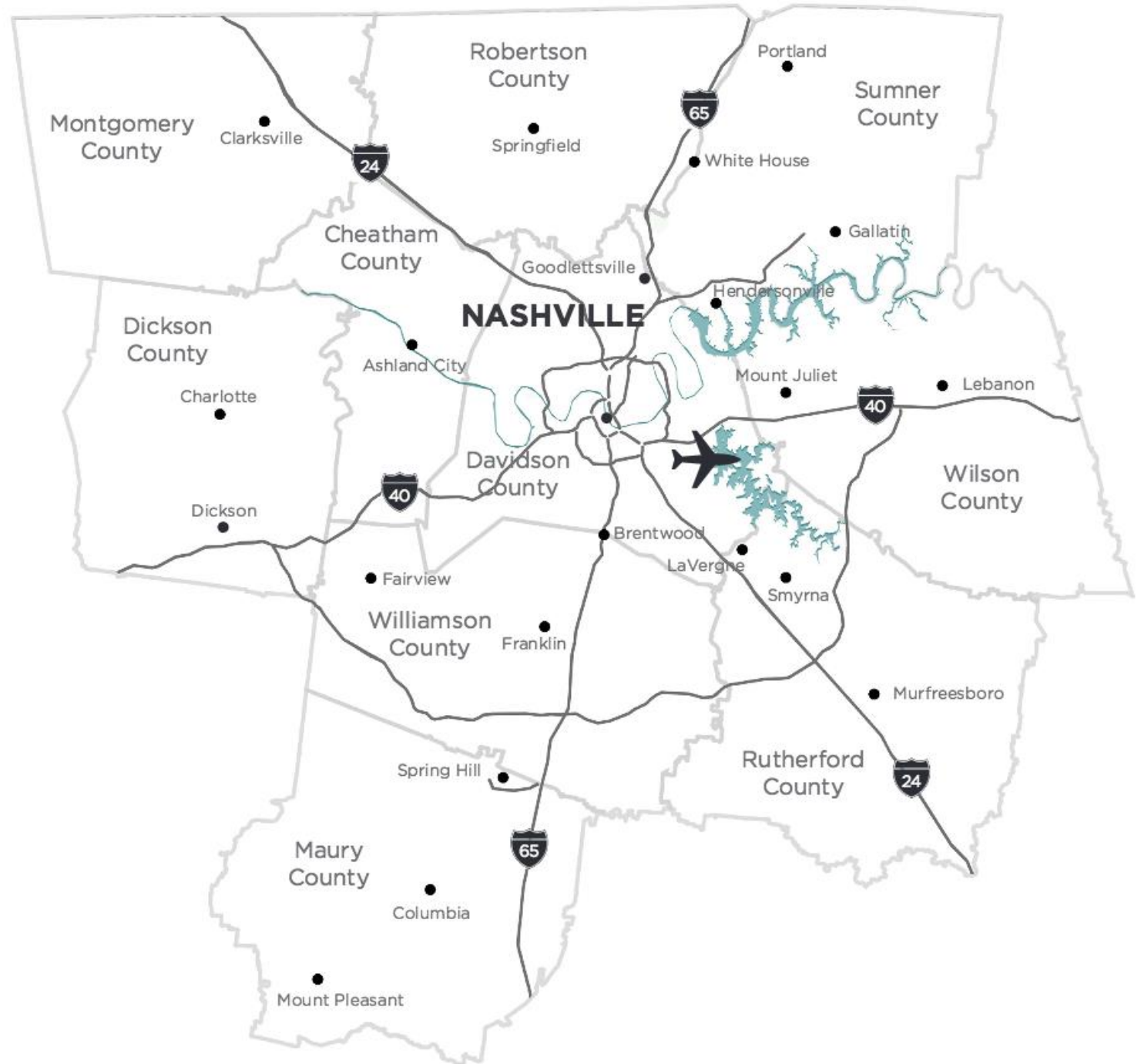
NFL, NHL and AAA MLB Teams

Booming food and dining scene

And so much more...



NASHVILLE ECONOMIC REGION



NASHVILLE ECONOMIC SNAPSHOT

1.86 million population (2% annual growth)

Population growth of **more than 185%** since 1990

1,000,000+ labor force

95.5 cost of living index (100 = U.S. average)

\$50,635 per capita income

3.3% unemployment rate (July 2017)

BUSINESS ACTIVITY

June 2016 - Present

112 business
relocations and
expansions

10,942 announced
new jobs

\$2.478B capital
investment

9.968M square feet
occupied

BRIDGESTONE



Schneider
Electric

smile
DIRECT CLUB

LOWE'S



GAP



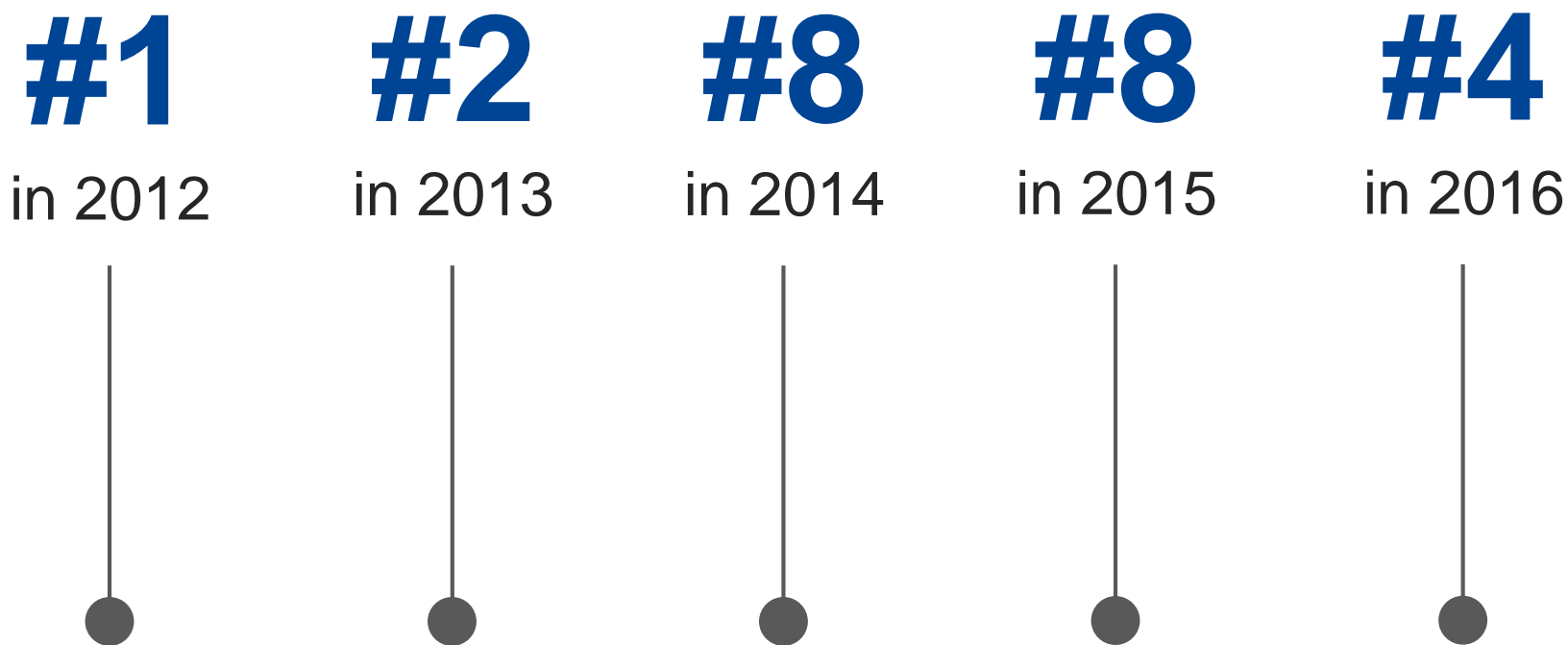
FORRESTER



WARNER MUSIC GROUP

JOB GROWTH

Top ten metro in the U.S. for job growth **five years in a row.**



Orlando	4.2%
Dallas	3.9%
Austin	3.8%
Nashville	3.8%
Charlotte	3.7%
Tampa	3.7%
San Francisco	3.6%
Raleigh	3.6%
Riverside	3.5%
Sacramento	3.5%

*Ranking based on U.S. Metros with over 1M in Population. Source: Bureau of Labor Statistics.

POPULATION GROWTH

The Nashville MSA ranked **11th in the U.S. for population growth** in 2016.

1.99% annual growth

36,337 new residents

25,358 net migration into Nashville

70 net new people per day on average

International migration accounted for **18% of all net migration**



1,865,298

population in 2016



ECONOMY



TALENT



LOCATION



LIVABILITY

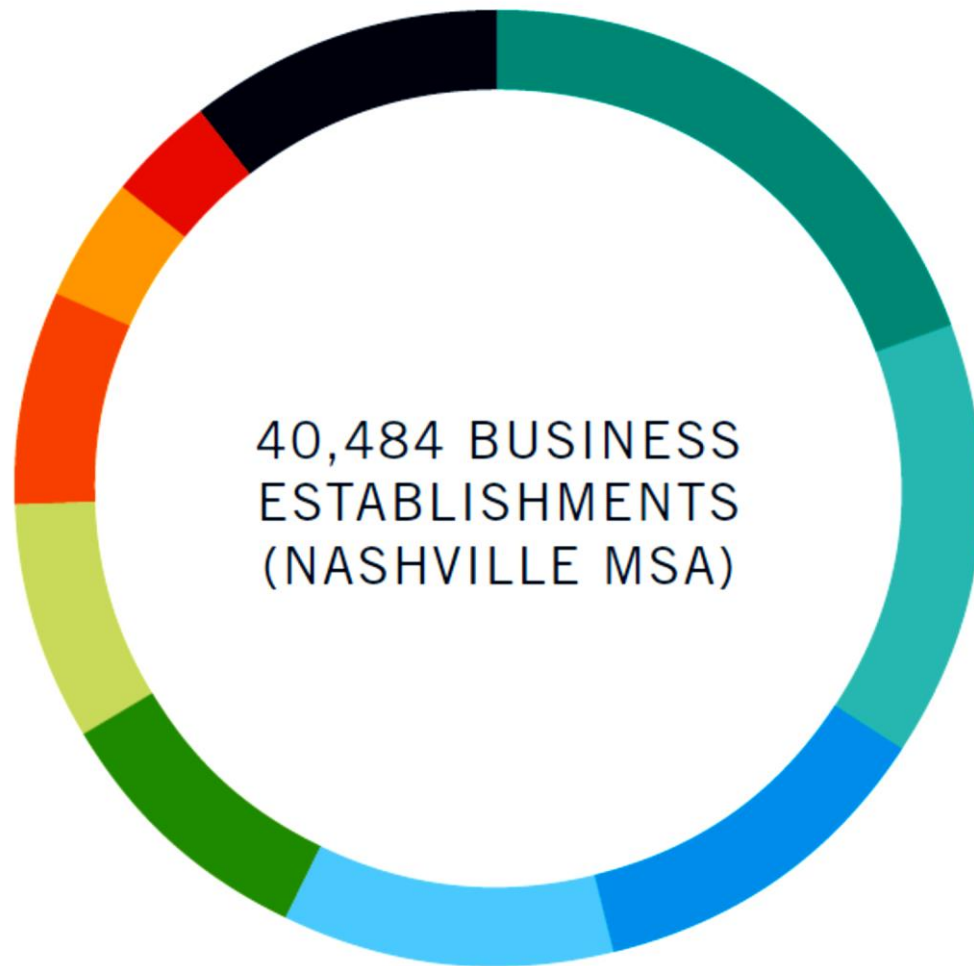


An aerial photograph of a city skyline at dusk. The sky is filled with soft, orange and purple clouds. In the center, a tall building is under construction, with a crane visible at the top. To the right, the Nashville skyline is visible, including the AT&T Building. The word "ECONOMY" is overlaid in large, white, sans-serif capital letters, centered horizontally and partially obscured by two white horizontal lines.

ECONOMY



DIVERSE ECONOMY



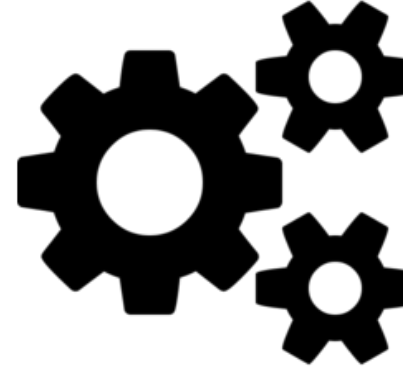
- Management, information, administration, professional and technical services (7,875)
- Retail trade (5,991)
- Finance, insurance and real estate (4,869)
- Health care and social assistance (4,445)
- Accommodation and food services (3,753)
- Transportation, warehousing and wholesale trade (3,211)
- Construction (2,966)
- Education, arts, ent. and rec. (1,695)
- Manufacturing (1,440)
- Miscellaneous services (4,239)

ECONOMIC DRIVERS



Health Care management

250,000 jobs
\$39B economic impact



Advanced Manufacturing

84,300 jobs
\$9.5B economic impact



Music & Entertainment

60,000 jobs
\$10B economic impact



Tourism & Hospitality

103,400 jobs
\$5.7B economic impact



LOCATION



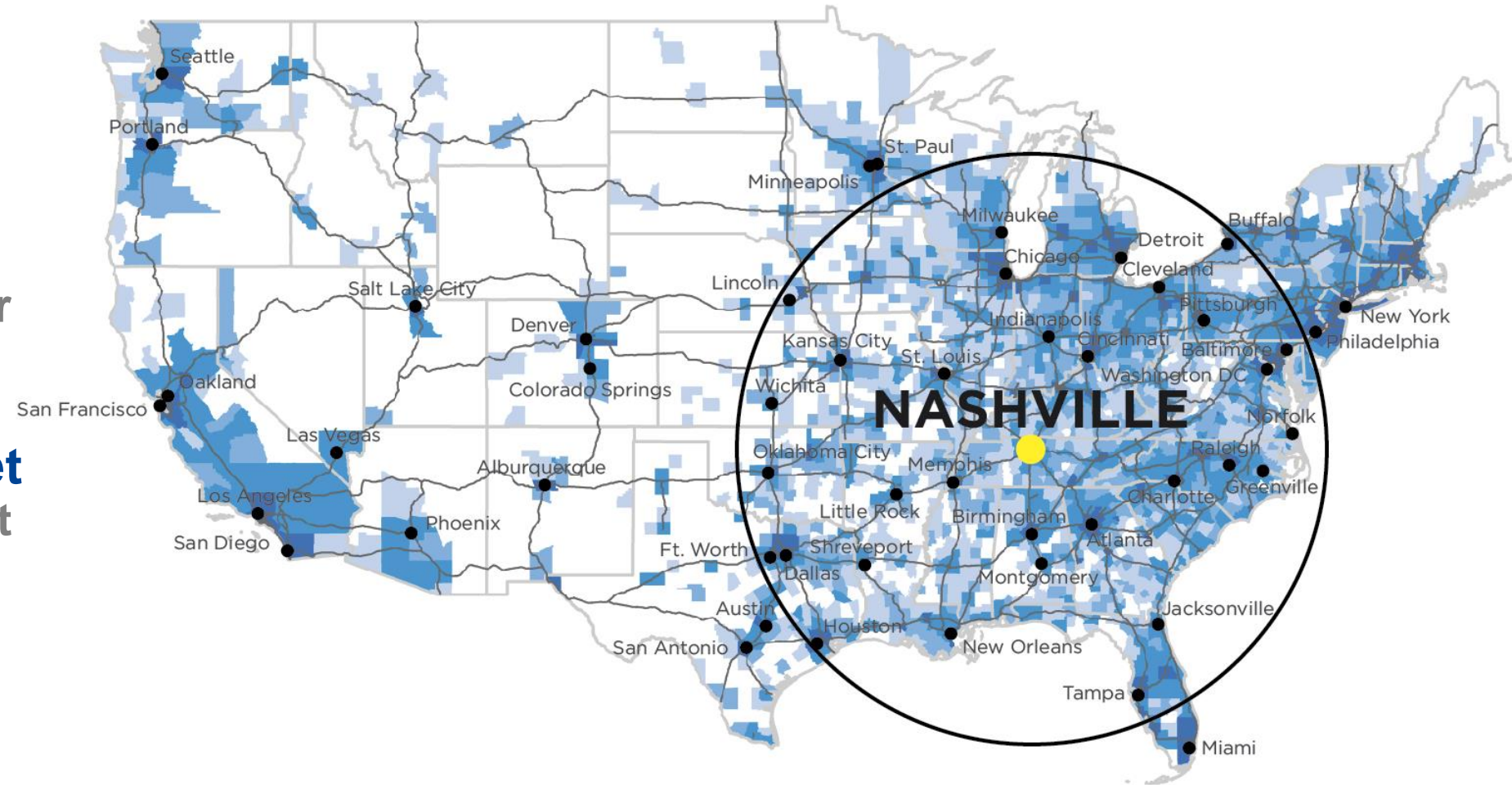
ACCESSIBLE & STRATEGIC

50% of the U.S. population lives within 650 miles of Nashville

12 million people live within a 2.5 hour drive

75% of U.S. market within a 2-hour flight

One of only 6 U.S. cities where **3 interstates converge**



NASHVILLE INTERNATIONAL AIRPORT

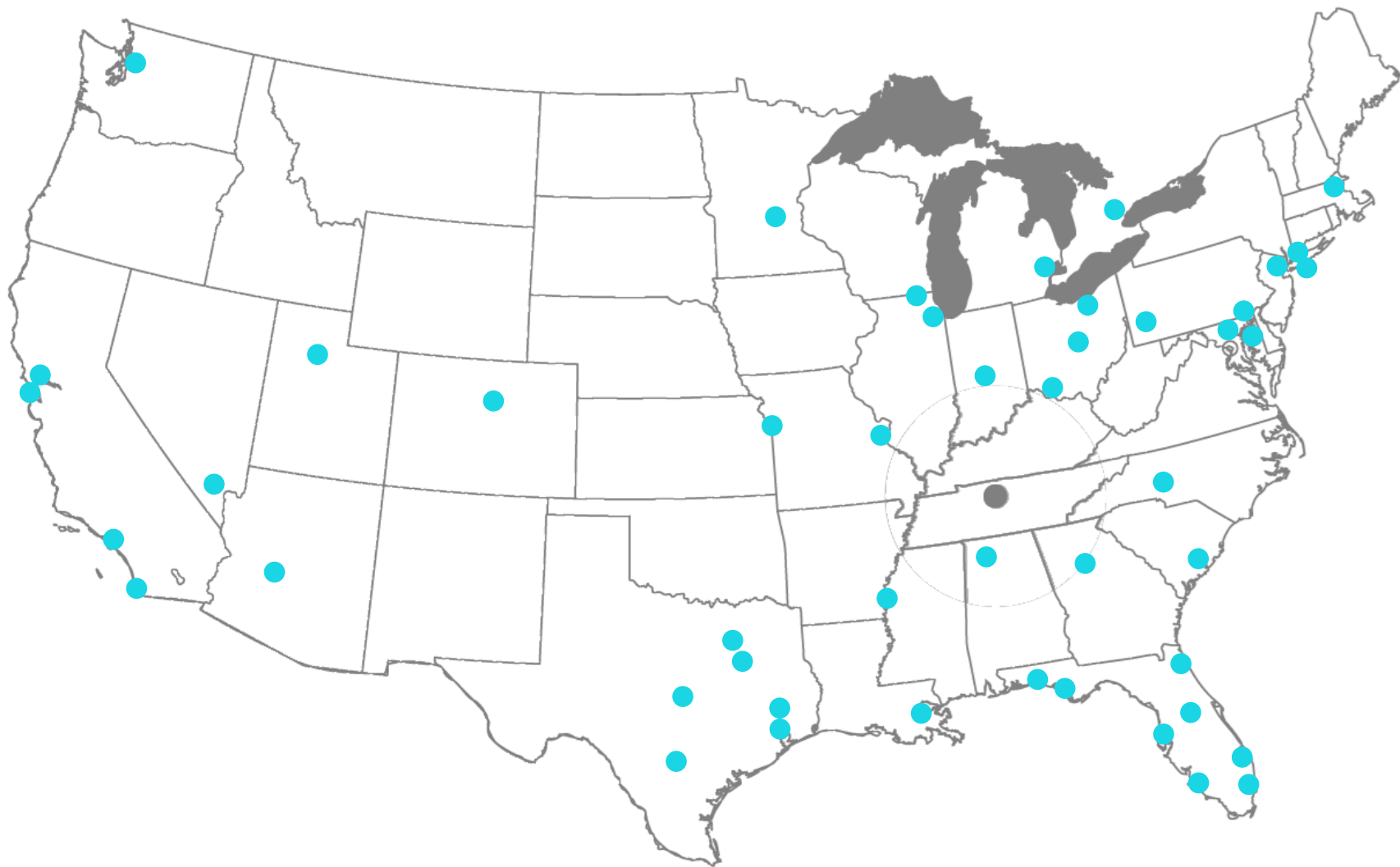
Located **8 miles from downtown**

440 average daily flights

10 carriers with more than **50 non-stop destinations**

75% of U.S. market within a **2 hour flight**

New **nonstop service to London** starting May 2018



LIVABILITY

Cost of living **4.5% below** the national average

	Composite Index	Grocery Items	Housing	Utilities	Transportation	Health Care	Misc. Goods and Services
Nashville	95.5	95.8	86.9	89.9	101.5	83.1	103.4
Austin	96.7	86.9	94.8	102.9	98.3	102.7	99.1
Atlanta	98.7	103.8	88.5	103.1	101.7	107.9	101.6
Chicago	118.5	108.5	144.8	94.9	125.7	102.7	108.2
Los Angeles	142.3	112.4	223.1	106.3	133.5	110.3	106.8
Boston	148.1	105.7	201.2	158.0	104.3	94.6	95.5
San Francisco	177.4	131.0	323.1	107.1	135.9	119.5	119.1
NYC	228.2	128.2	465.9	127.1	133.6	115.6	148.0



TALENT



An aerial photograph of the Nashville skyline at sunset. The sky is filled with soft, orange and pink clouds. In the center, a tall skyscraper is under construction, with its steel framework visible and a construction crane on top. To the left, a white building with a red 'Sheraton' sign is visible. To the right, the AT&T Building (now 150 Broadway) stands prominently. Other buildings with 'Regions' and 'SunTrust' logos are also visible. The foreground shows a mix of urban buildings and parking lots.

ALEX HUGHES

VP, TALENT ATTRACTION AND RETENTION

NASHVILLE AREA CHAMBER OF COMMERCE



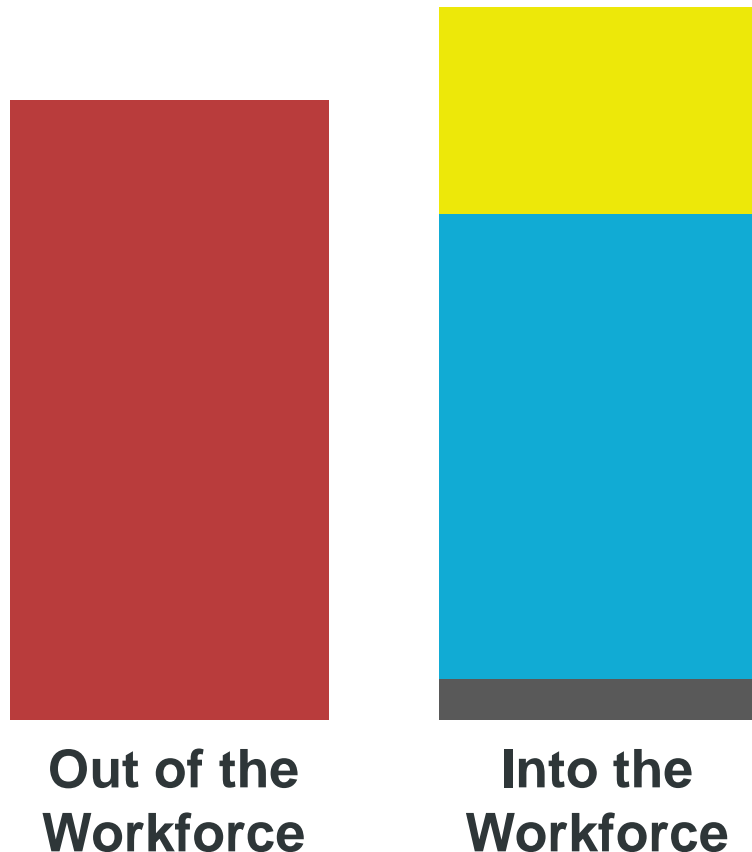
TALENT DEVELOPMENT

Preparing the Next Generation of Talent

- **Focus on K-12 education**
- **Increasing post secondary attainment and leadership skills**
- **Align supply and demand**
- **Attract and retain bright, educated talent**
- **Young professional initiatives**

SUPPLY AND DEMAND

Next 5 Years

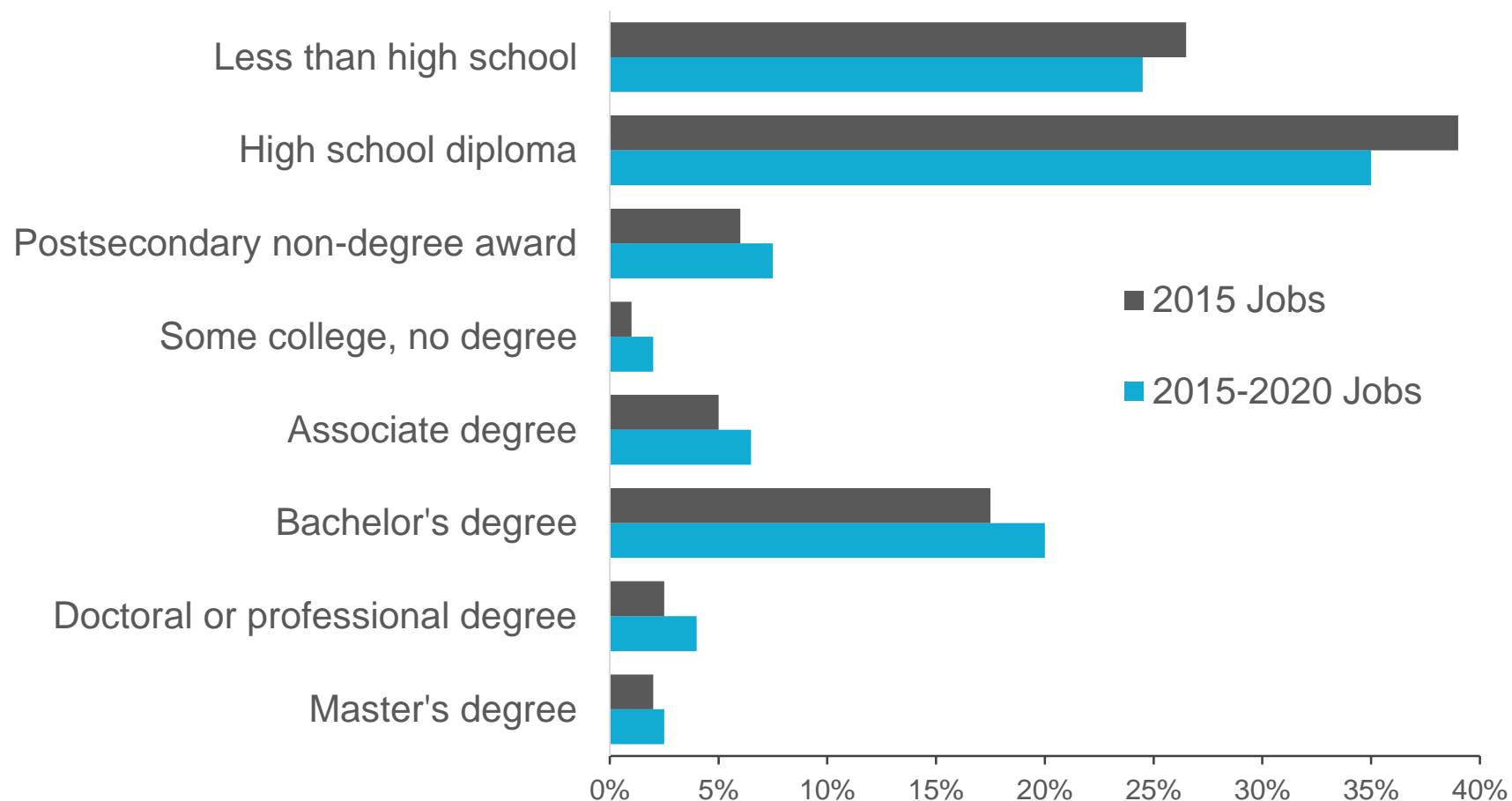


- **120,000 -140,000** individuals leaving the workforce
- **8,000 - 12,000** unemployed return to work
- **90,000 -115,000** high school and college graduates enter local workforce
- **40,000 - 50,000** persons new to labor market (migration) with a majority having prior experience



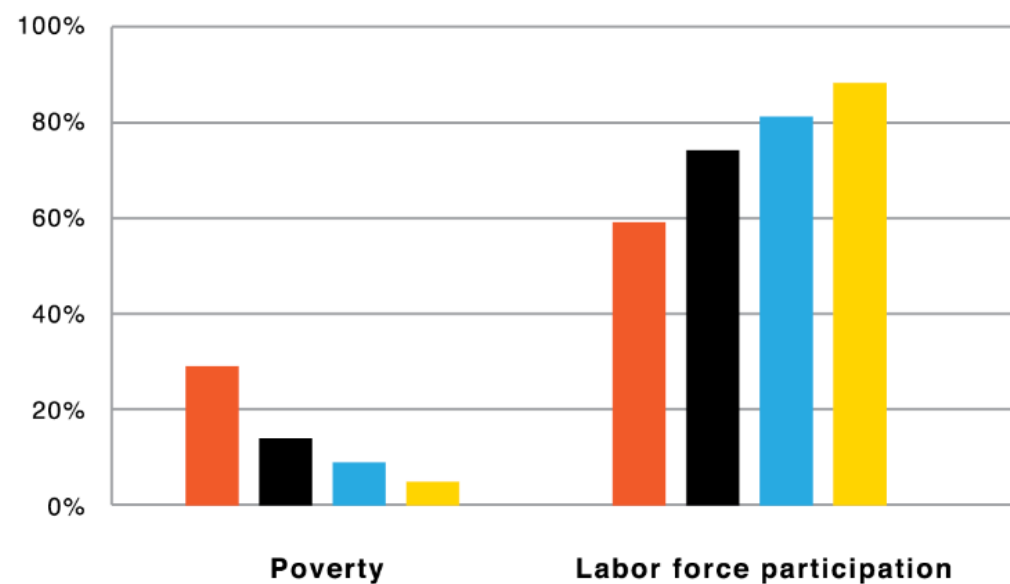
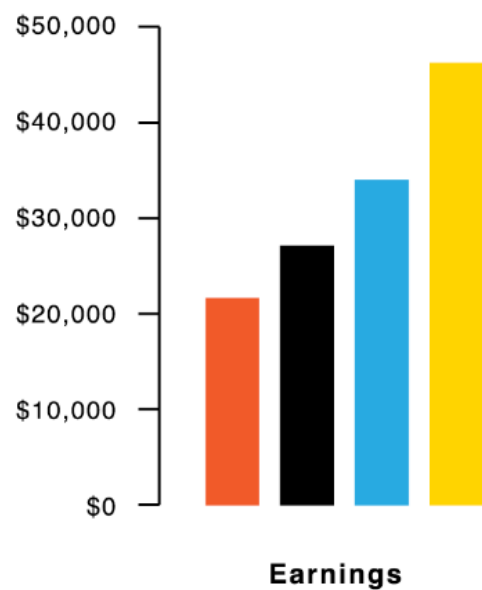
EDUCATIONAL REQUIREMENTS

Next 5 Years



EDUCATIONAL ATTAINMENT

IMPROVING POSTSECONDARY ATTAINMENT



BUILDING TALENT



We Build Tech

- Coding Camps
- Internships
- Apprenticeships

Accelerated Training

- Nashville Software School

EDUCATED WORKFORCE



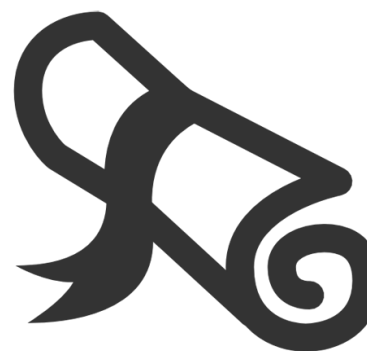
24 higher education institutions in the Nashville region



60% of all graduates remain in the region after graduation



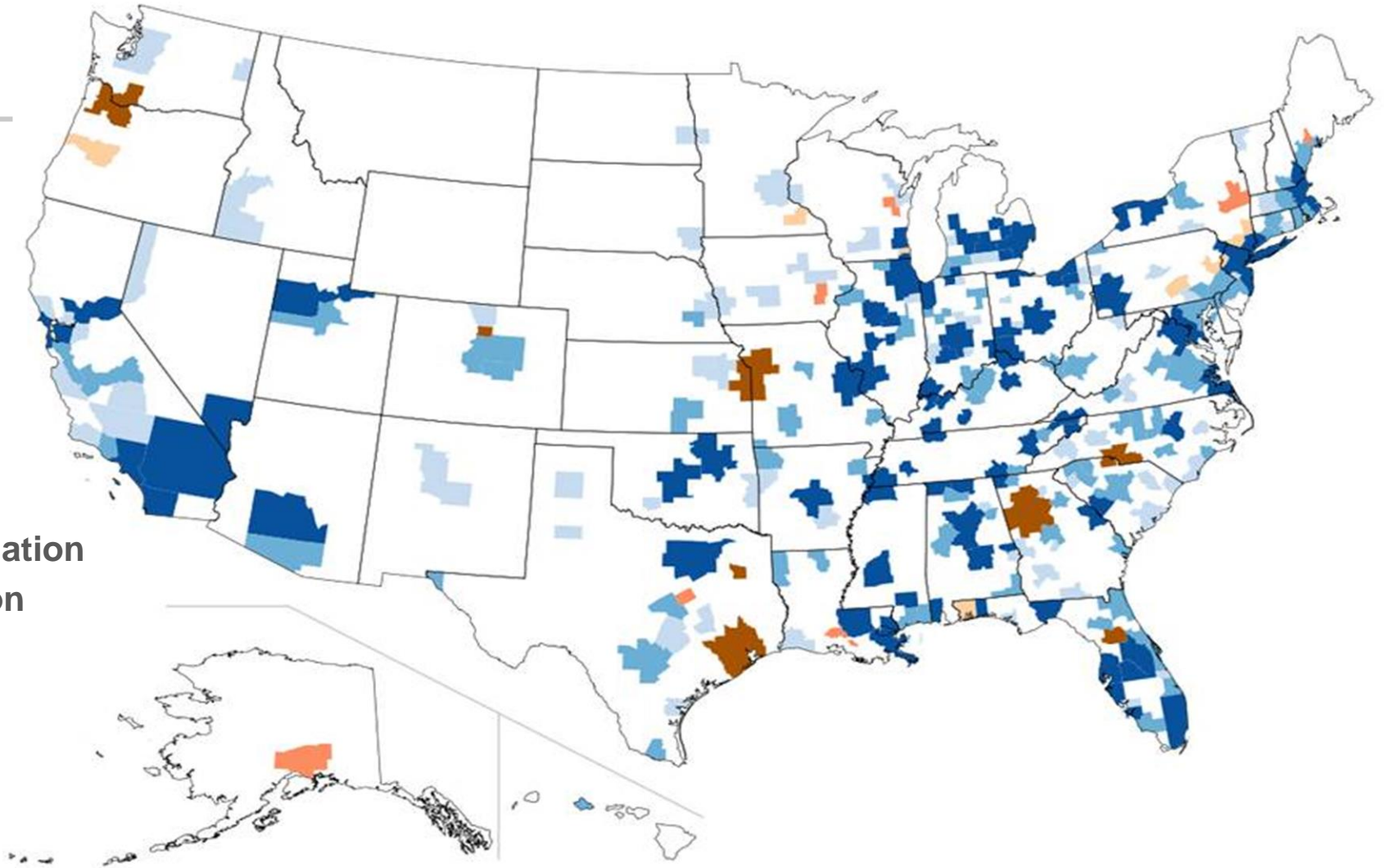
123,000 currently enrolled students with **26,000** annual graduates



131,000+ workforce with graduate or professional degrees

NASHVILLE MIGRATION

Blue – Nashville gained population
Red – Nashville lost population



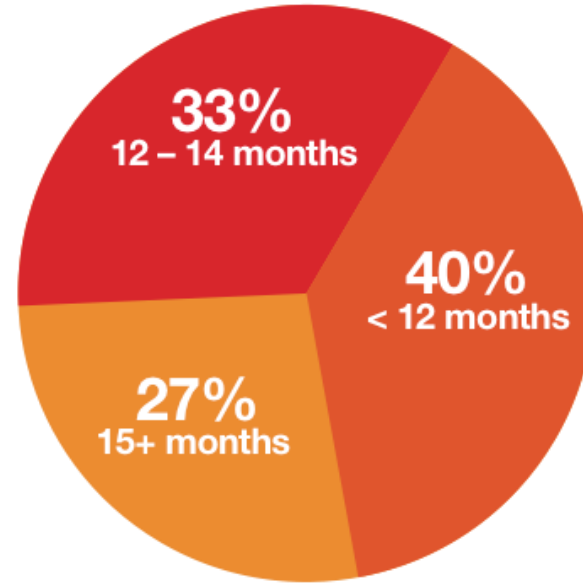
workIT

NASHVILLE



THE NEED

1,800
open
technology
positions



THE GUIDEBOOK



RESULTS

- **116 million total impressions** from 4,720 cities and 156 countries
- 289,000 job searches conducted on the website
- 36,532 candidate searches conducted on the website
- **2,500 candidates** created profiles from 45 states and 114 countries
- **272 companies** created profiles
- 14,320 jobs were posted on the site during the first year
- 46,278 unique visitors to the website since launch.

WHERE ARE WE NOW?



YOUNG TALENT NEEDS IN COOL COMMUNITIES

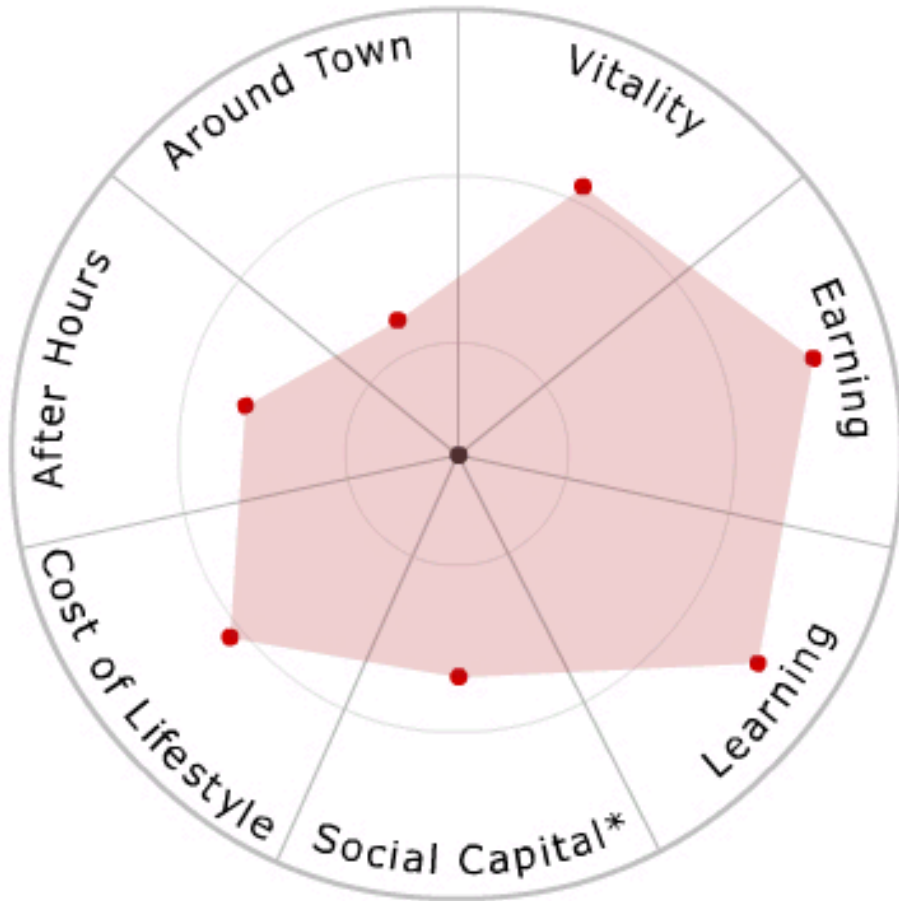
M E A S U R E D B Y :

1. Earning Index
2. Learning Index
3. Vitality Index
4. After Hours Index
5. Around Town Index
6. Cost of Lifestyle Index
7. Social Capital Index



Nashville

COOL COMMUNITY SCORECARD



- Higher than all comparative communities in Earning and Learning
- Cost of Lifestyle and Vitality also strong
- #12 in 2001 Hot Jobs – Cool Communities Report

COOL SCHOOL METHODOLOGY

- **PROVIDE SOCIAL MENTORS** – Connect transplants with like-minded employees & networking opportunities.
- **INVEST IN COMMUNITY EVENTS** – Encourage volunteering & support charitable causes.
- **PROVIDE RESOURCES** – Where to go & what to do?
- **DEVELOP NEW HIRE WELCOME KIT** – Feature Nashville neighborhoods, new resident information, CD-ROM
- **SUPPORT YOUNG PROFESSIONAL GROUPS** – pay for memberships, encourage participation.



OVERVIEW

SUMMARY

YP Nashville is a partnership between the Nashville Area Chamber of Commerce and 50 young professional organizations working to engage, connect and empower young professionals to actively shape the future of the Nashville region.

EVENTS

YP Nashville Connect
Nashville Emerging Leader Awards
Leadership Retreat
Leadership Series

A night-time photograph of a city skyline, likely Pittsburgh, featuring a large steel bridge (the Fort Pitt Bridge) spanning a river. In the foreground, a multi-decked riverboat is illuminated and moving across the water. The city lights and bridge structure are reflected in the water. The word "QUESTIONS?" is overlaid in large white letters, flanked by horizontal lines.

QUESTIONS?

