

Tennessee Leaders Action Platform



global action
platform
food+health+prosperity

Zone 3: Chattanooga

Competitiveness and Clusters Factbook 2026



**CLUSTER
MAPPING**
A Strategy and Competitiveness Associates project

Made possible through the generous support of the
John R. Ingram Advised Fund of the Community Foundation of Middle Tennessee.

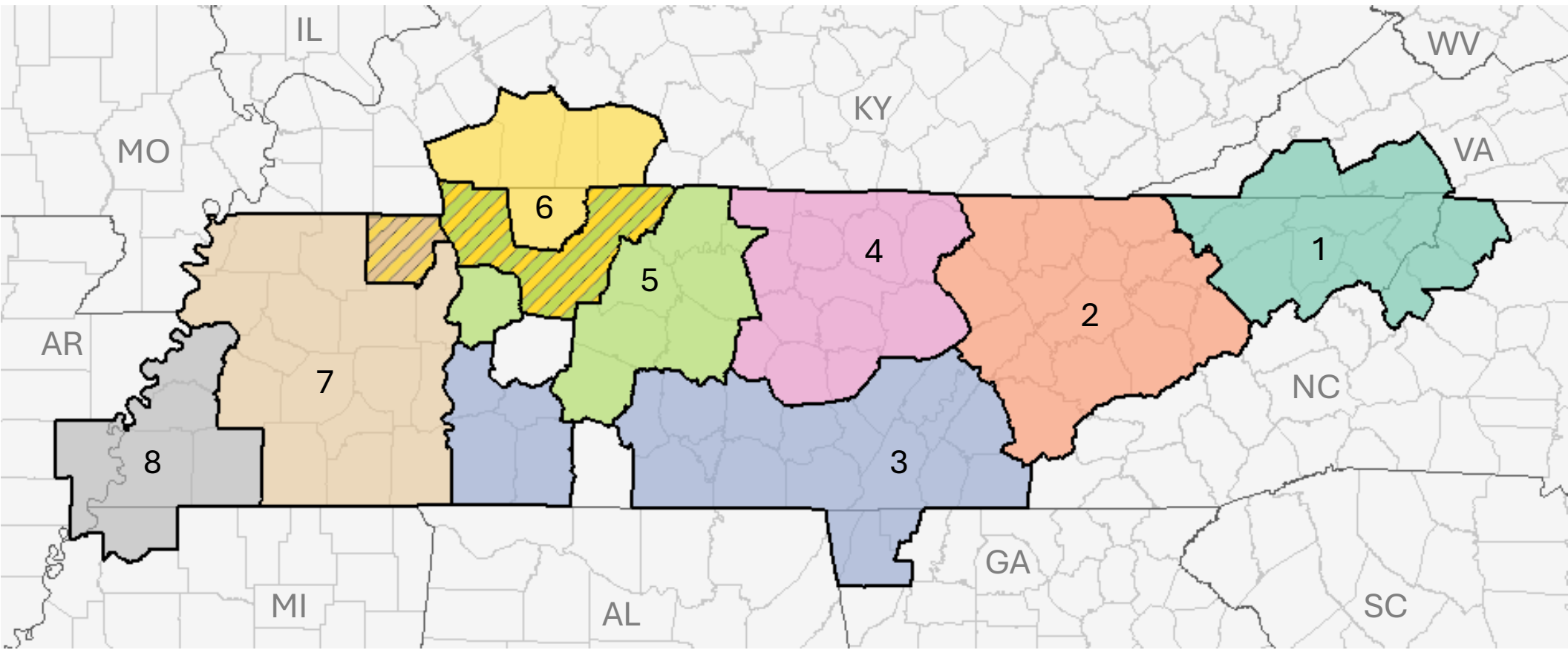
Introduction

The research and publication of the Tennessee Competitiveness Scorecard and the Regional Competitiveness and Cluster Factbooks are made possible through the generous support of the **John R. Ingram Advised Fund of the Community Foundation of Middle Tennessee** to provide a data-driven foundation for regional competitiveness .

Global Action Platform has organized the Tennessee Leaders Action Platform to advance the competitiveness and guide the eight major cluster economies anchored in Tennessee and adjacent states. This Competitiveness and Cluster Factbook is provided to the Fellows of the Porter Development Initiative Fellows Academy to advance data-driven strategies and decisions for regional development. The Academy gives Tennessee leaders access to cutting-edge ideas, metrics, and practical strategies to create shared prosperity for their communities and supports initiatives that connect creation of globally competitive innovation hubs with education and research, regional collective impact collaboration, and quality of life.

Strategy and Competitiveness Associates has leveraged data from the US Cluster Mapping Project to assemble factbooks customized for each of the eight Tennessee Leaders Action Platform (TLAP) regions. These factbooks are structured around the four major themes for the inaugural TLAP conference to be held in June 2026: Innovation Hub Development, Education and Workforce, Collaborative Governance, and Quality of Life. This work owes much to our long collaboration with Prof. Michael E. Porter at Harvard Business School, especially around his insights on the foundational role of Traded Clusters in regional economic development and on the role of public-private partnerships in support of the quality of regional business environments surrounding clusters and in support of social progress for all citizens.

Tennessee Leaders Action Platform: Eight Zones Organized



- Zone 1: Tri-Cities
- Zone 2: Knoxville-Oak Ridge
- Zone 3: Chattanooga
- Zone 4: Cookeville-Crossville
- Zone 5: Nashville
- Zone 6: Clarksville-Fort Campbell
- Zone 7: Jackson-Martin
- Zone 8: Memphis

Note: The Clarksville-Fort Campbell Zone overlaps with two other zones.

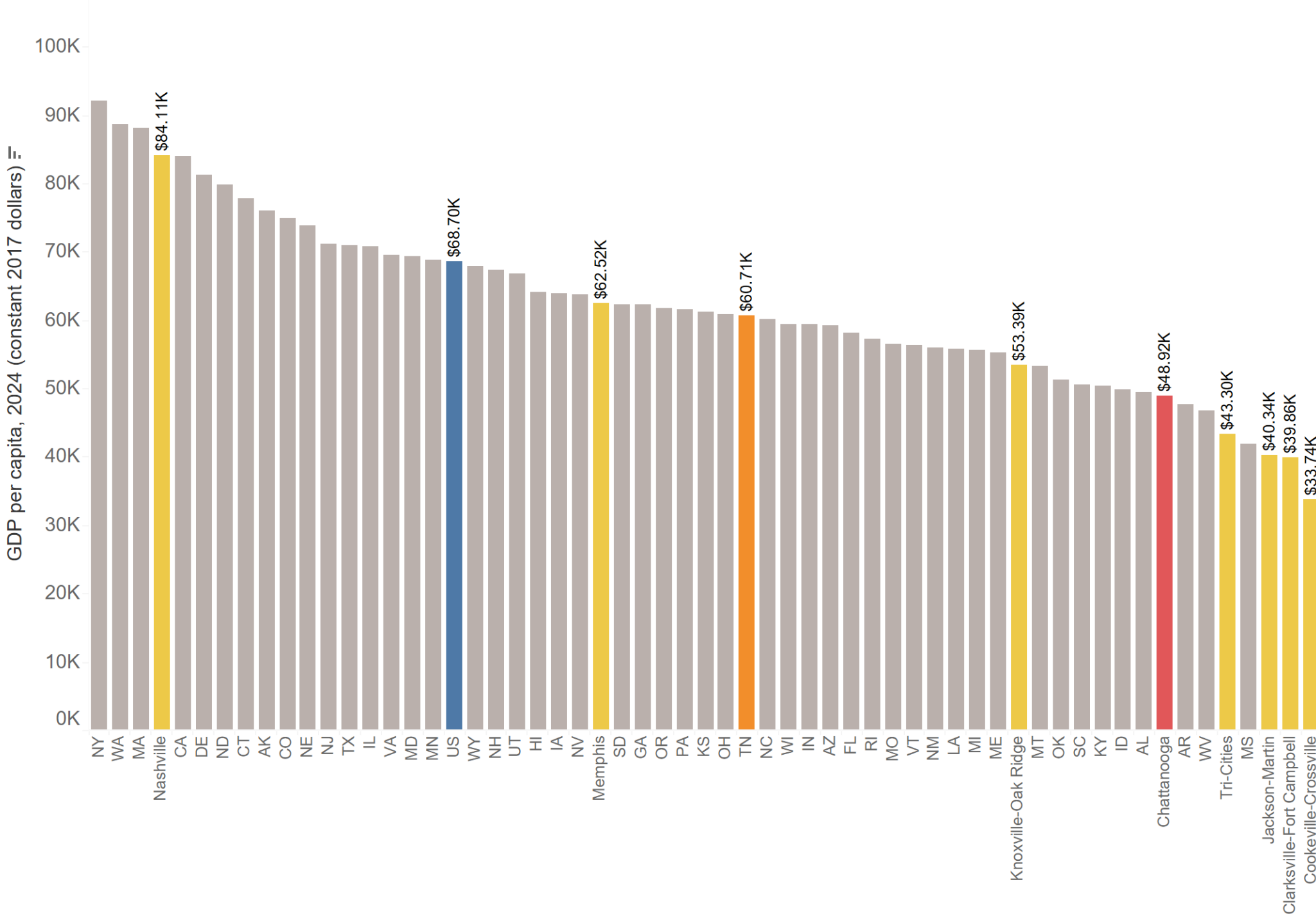
Contents

I. Innovation Hub Development	
a) Economic Outcomes	page 5
b) Innovation Inputs	page 13
c) Cluster Composition	page 21
II. Education and Workforce	page 32
III. Collaborative Governance	page 40
IV. Quality of Life	page 45

Economic Outcomes

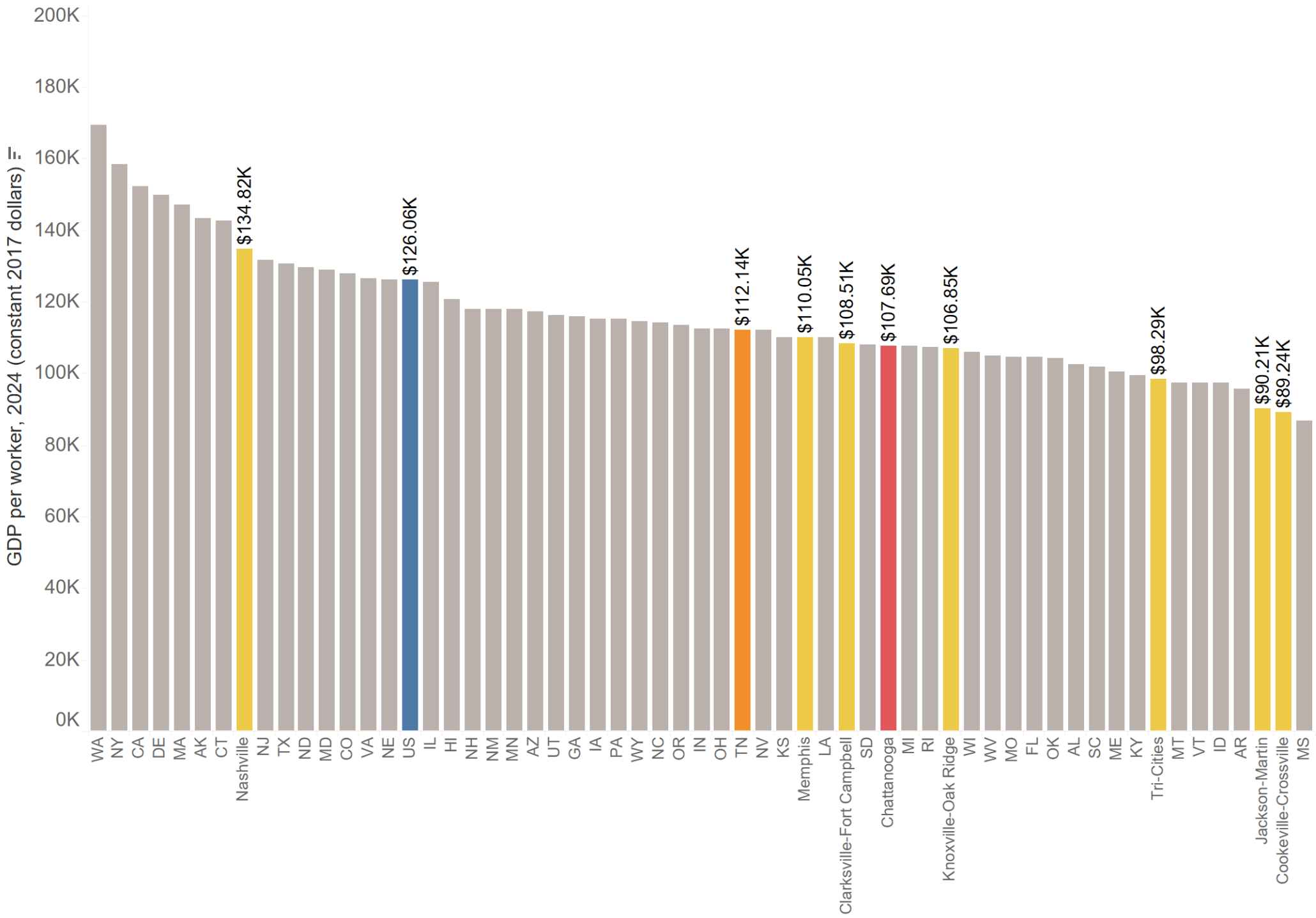
GDP per Capita	page 6
GDP per Capita Real Growth Rate	page 7
GDP per Worker	page 8
GDP per Worker Real Growth Rate	page 9
Average Wage and Wage Growth	page 10
Employment Growth and Wage Growth	page 11
Fortune 1000 Company Headquarters Locations	page 12

GDP per capita, 2024



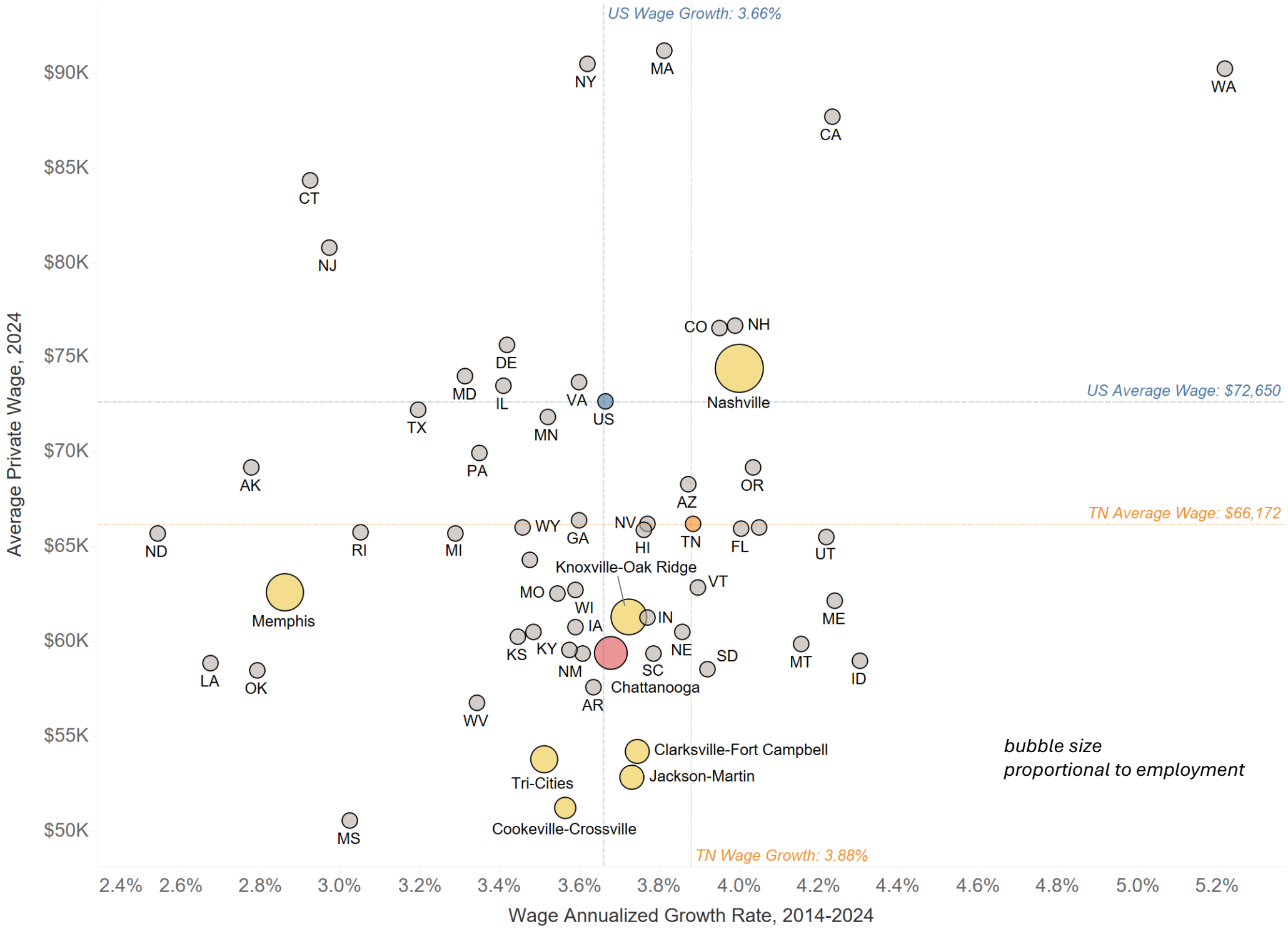
Source: US Cluster Mapping Project; BEA; Census

GDP per worker, 2024



Source: US Cluster Mapping Project; BEA; Census

Average Wage and Wage Growth, 2014-2024



Source: US Cluster Mapping Project; BLS QCEW; Census NES – private employment

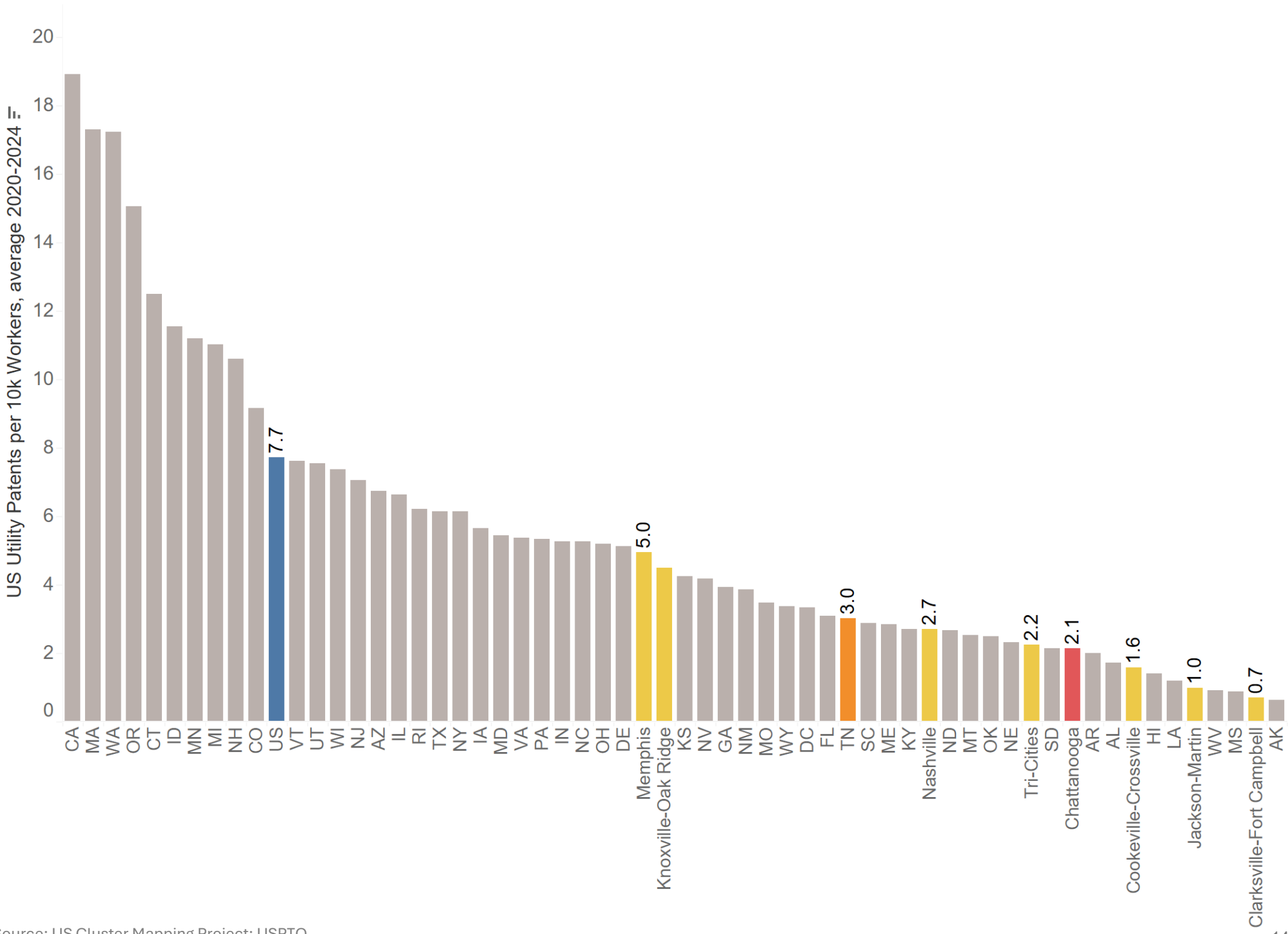
Employment Growth and Wage Growth, 2014-2024



Innovation Inputs

Patenting Intensity	page 14
Patents by Organization	page 15
University R&D Expenditures	page 16
New Business Formation	page 17
Growth Rate of FDI-driven Employment*	page 18
Share of Employment Created through FDI*	page 19
Export Intensity and Rate of Growth*	page 20

Patenting Intensity, 2020-2024



Source: US Cluster Mapping Project; USPTO

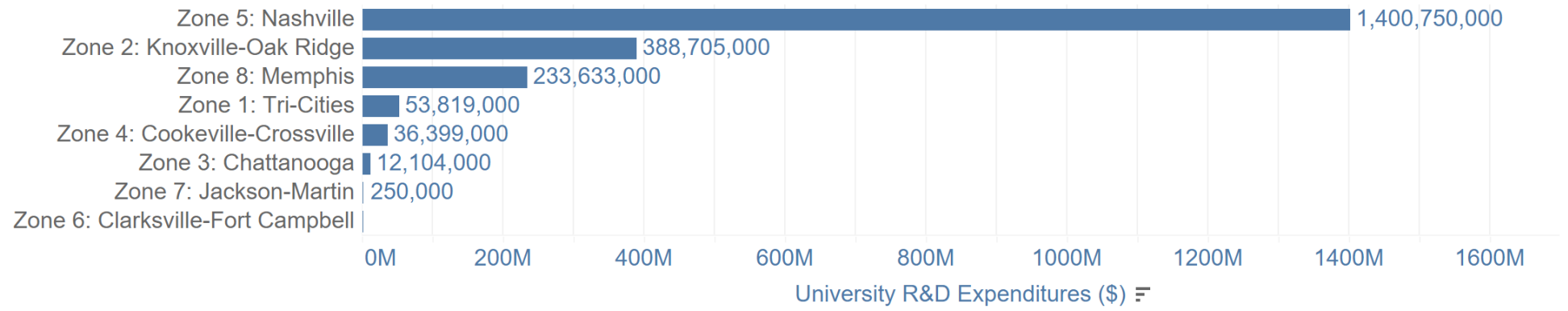
Utility Patents by Organization, 2020-2024

Zone 3: Chattanooga

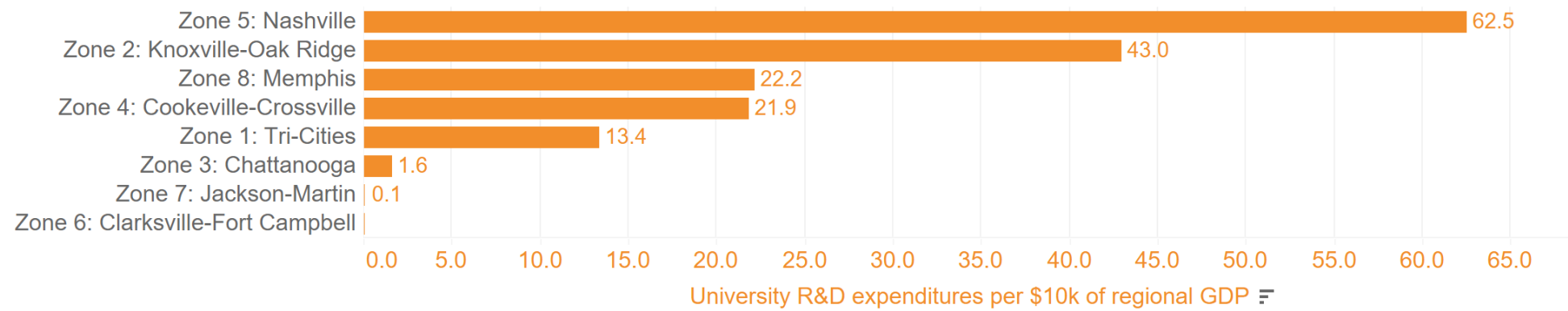
MUELLER INTERNATIONAL, LLC	113
COLUMBIA INSURANCE COMPANY	31
ALADDIN MANUFACTURING CORPORATION	30
CARD-MONROE CORP.	23
LODGE MANUFACTURING COMPANY	21
THE HEIL CO.	15
LA-Z-BOY INCORPORATED	13
ROADTEC, INC.	12
TUFTCO CORPORATION	11
WADDINGTON NORTH AMERICA, INC.	11
WESTINGHOUSE ELECTRIC COMPANY LLC	10
AFS NEWCO, LLC	9
ASTEC, INC.	8
ENGINEERED FLOORS LLC	7
PROXENSE, LLC	7
RHINOGRAM INC.	7
OLIVER TECHNOLOGIES, INC.	6
ZEE COMPANY	6
ZEE COMPANY I, LLC	6
HAIER US APPLIANCE SOLUTIONS, INC.	5
BOOZ ALLEN HAMILTON INC.	4
CARLISLE CONSTRUCTION MATERIALS, LLC	4
LODESTAR FIREARMS, INC.	4
M & M INDUSTRIES, INC.	4
OMNIMAX INTERNATIONAL, LLC	4

Note: Showing organizations with at least 2 patents 2020-2024 and in top 25 for region.
 Location is assigned by address of the first listed inventor and may differ from organization location.
 Source: US Cluster Mapping Project; USPTO.

University R&D Expenditures by TLAP Region, 2024



University R&D Intensity by TLAP Region, 2024

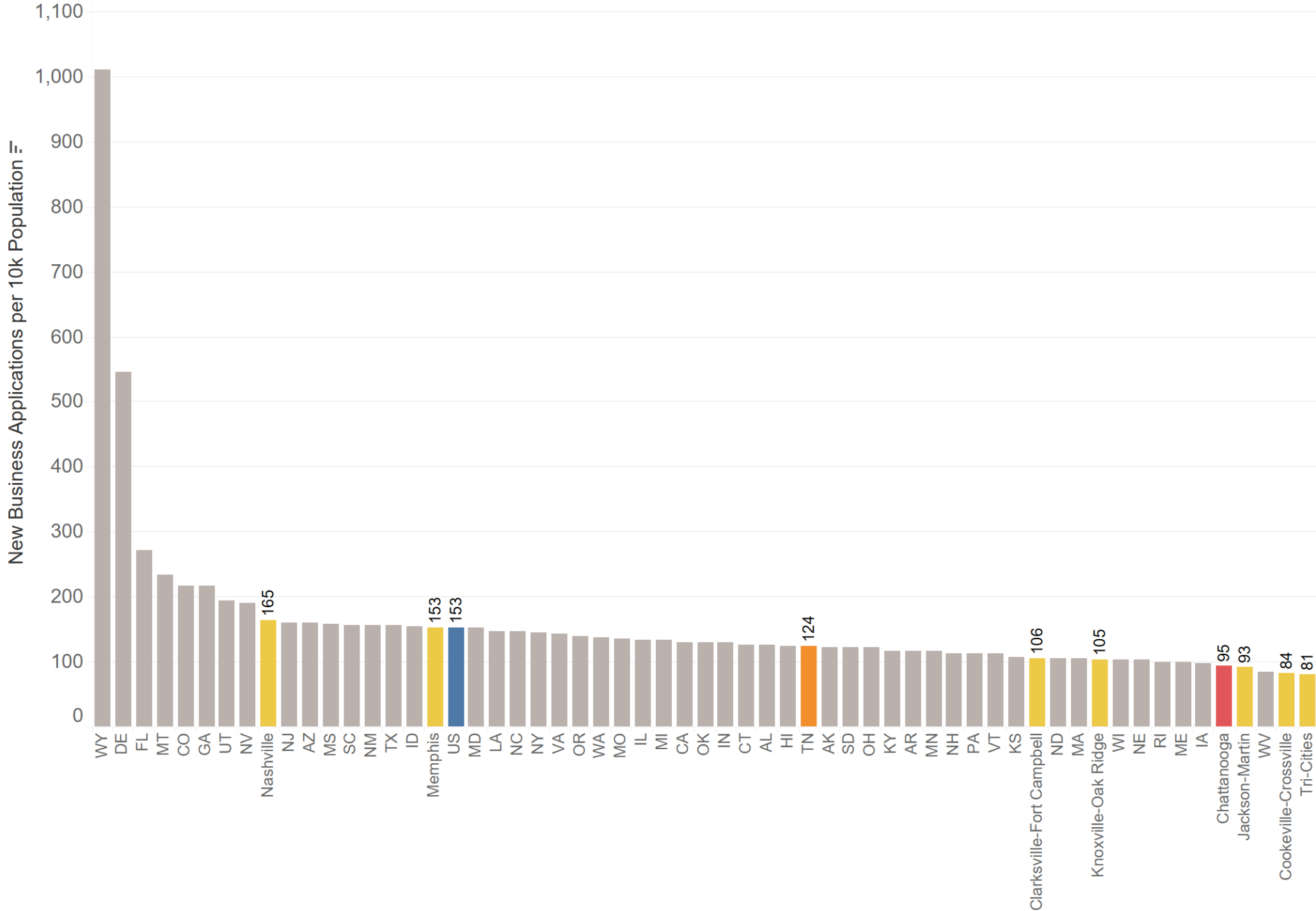


R&D Expenditure by University, 2024

Zone 1: Tri-Cities	East Tennessee State U.	\$42,526,000
	Appalachian State U.	\$11,293,000
Zone 2: Knoxville-Oak Ridge	U. Tennessee, Knoxville	\$386,949,000
	Lincoln Memorial U.	\$1,756,000
Zone 3: Chattanooga	U. Tennessee, The, Chattanooga	\$12,104,000
Zone 4: Cookeville-Crossville	Tennessee Technological U.	\$36,399,000
Zone 5: Nashville	Vanderbilt U. and Vanderbilt U. Medical Center	\$1,327,870,000
	Tennessee State U.	\$35,017,000
	Meharry Medical C.	\$23,691,000
	Middle Tennessee State U.	\$8,736,000
	Fisk U.	\$3,425,000
	Lipscomb U.	\$2,011,000
Zone 7: Jackson-Martin	U. Tennessee, The, Martin	\$250,000
Zone 8: Memphis	U. Tennessee, Health Science Center	\$124,771,000
	U. Memphis	\$108,862,000

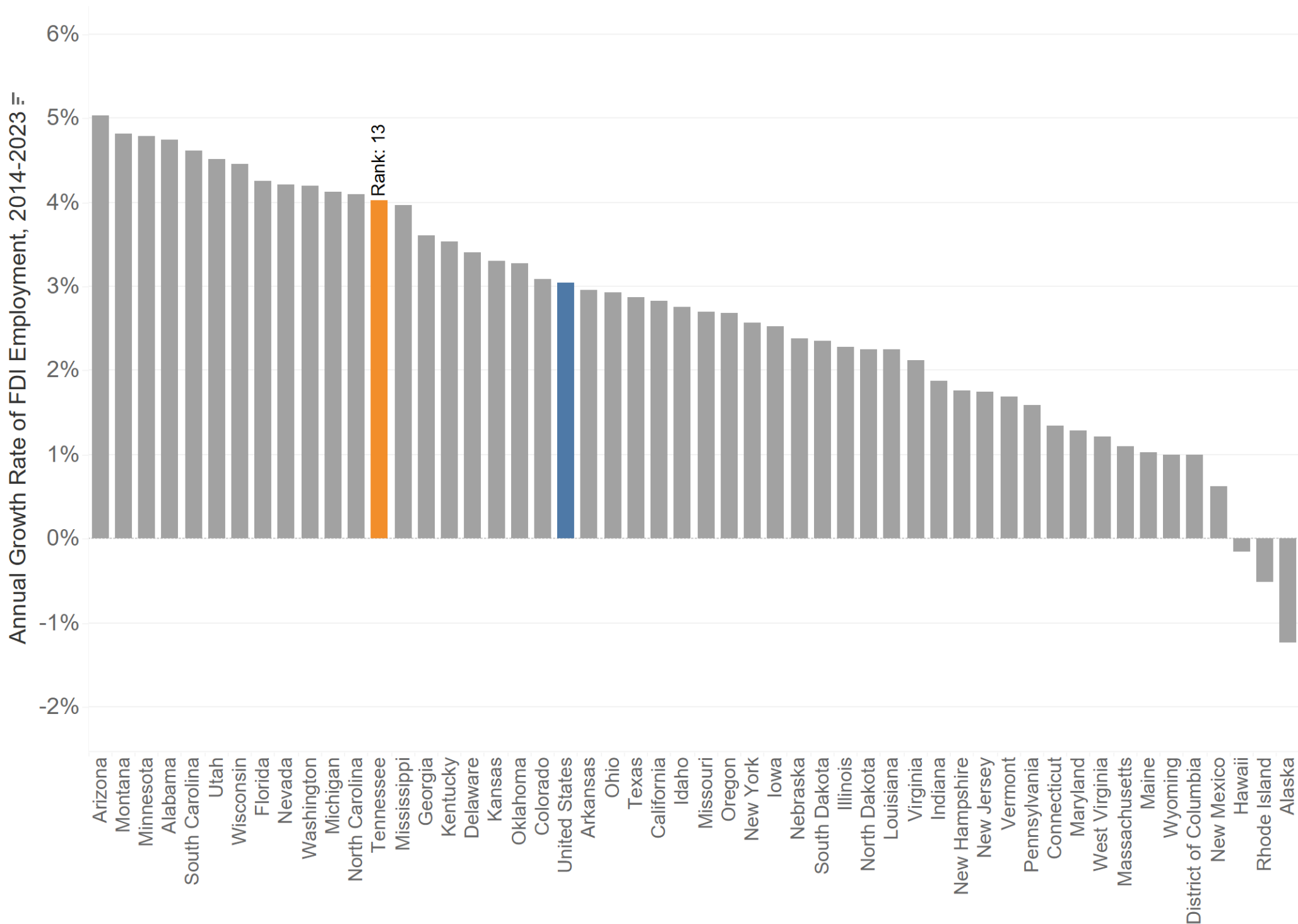
Source: US Cluster Mapping Project; NSF NCSES

New Business Formation, 2024



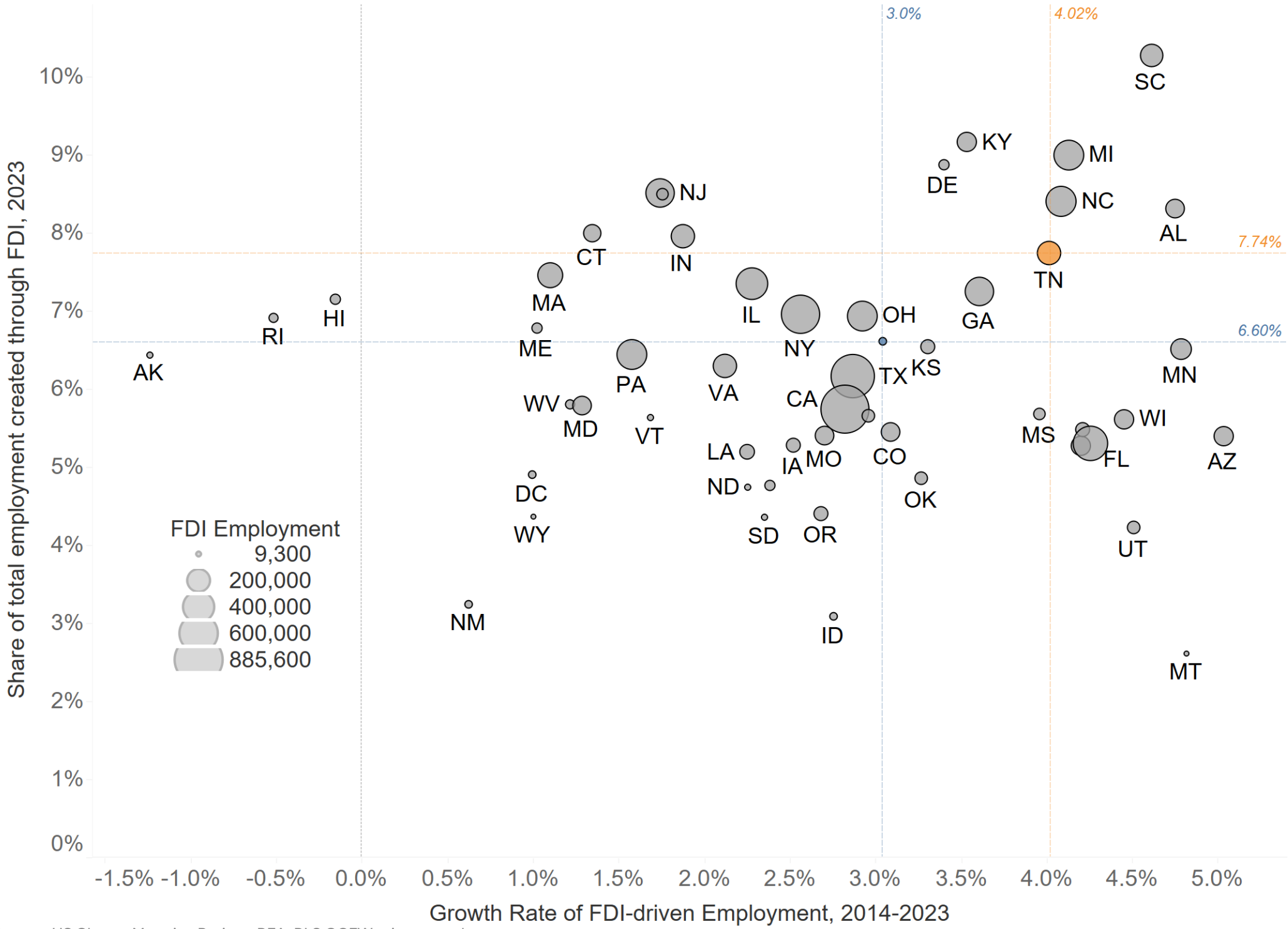
Source: US Cluster Mapping Project; BEA; Census

Growth Rate of FDI-driven Employment, 2014-2023



Source: US Cluster Mapping Project; BEA

Foreign Direct Investment, 2014-2023



Source: US Cluster Mapping Project; BEA; BLS QCEW private employment

Export Intensity and Rate of Growth, 2014-2024

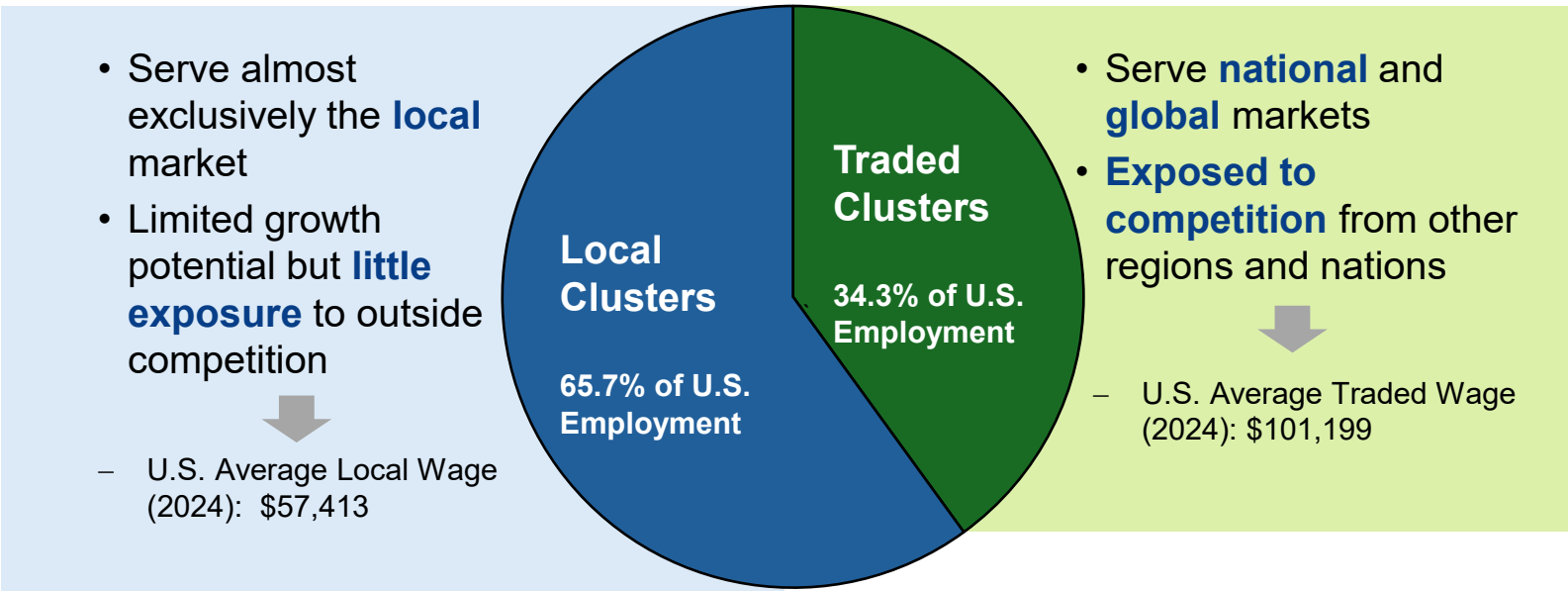


Source: US Cluster Mapping Project; BEA; USATrade. Nominal values.

Cluster Composition

Employment in Traded and Local Clusters	page 22
Employment in Traded Clusters	page 23
Job Creation in Traded Clusters	page 24
Wages in Traded Clusters	page 25
Specialization in Traded Clusters	page 26
Specialization in Traded Clusters (zoomed view)	page 27
Cluster Linkages and Economic Diversification	page 28
Employment in Local Clusters	page 29
Job Creation in Local Clusters	page 30
Wages in Local Clusters	page 31

Tri-Cities: Traded versus Local Clusters

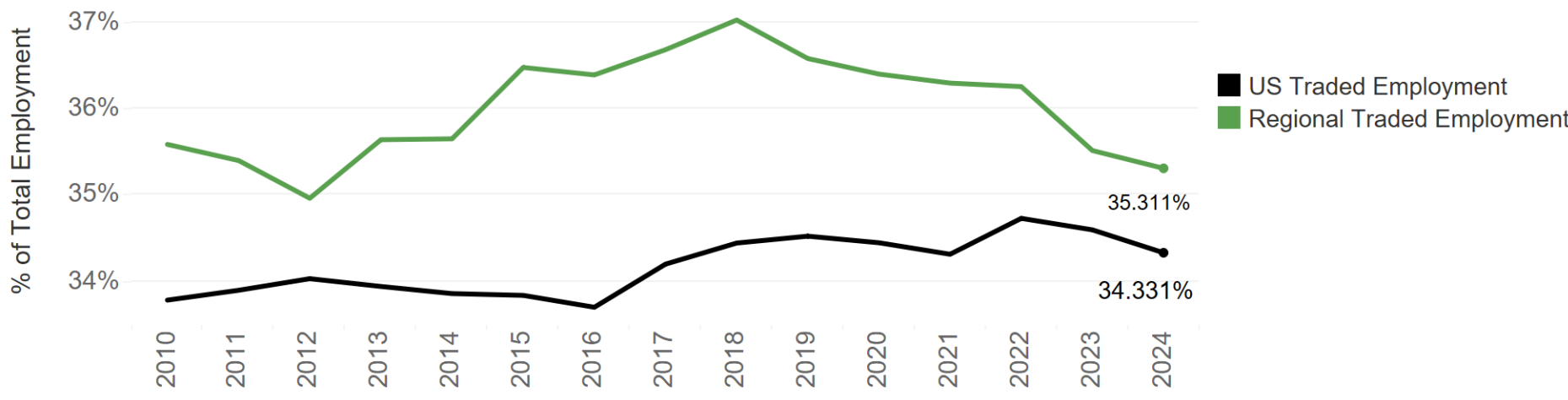


Traded Employment Share, 2024

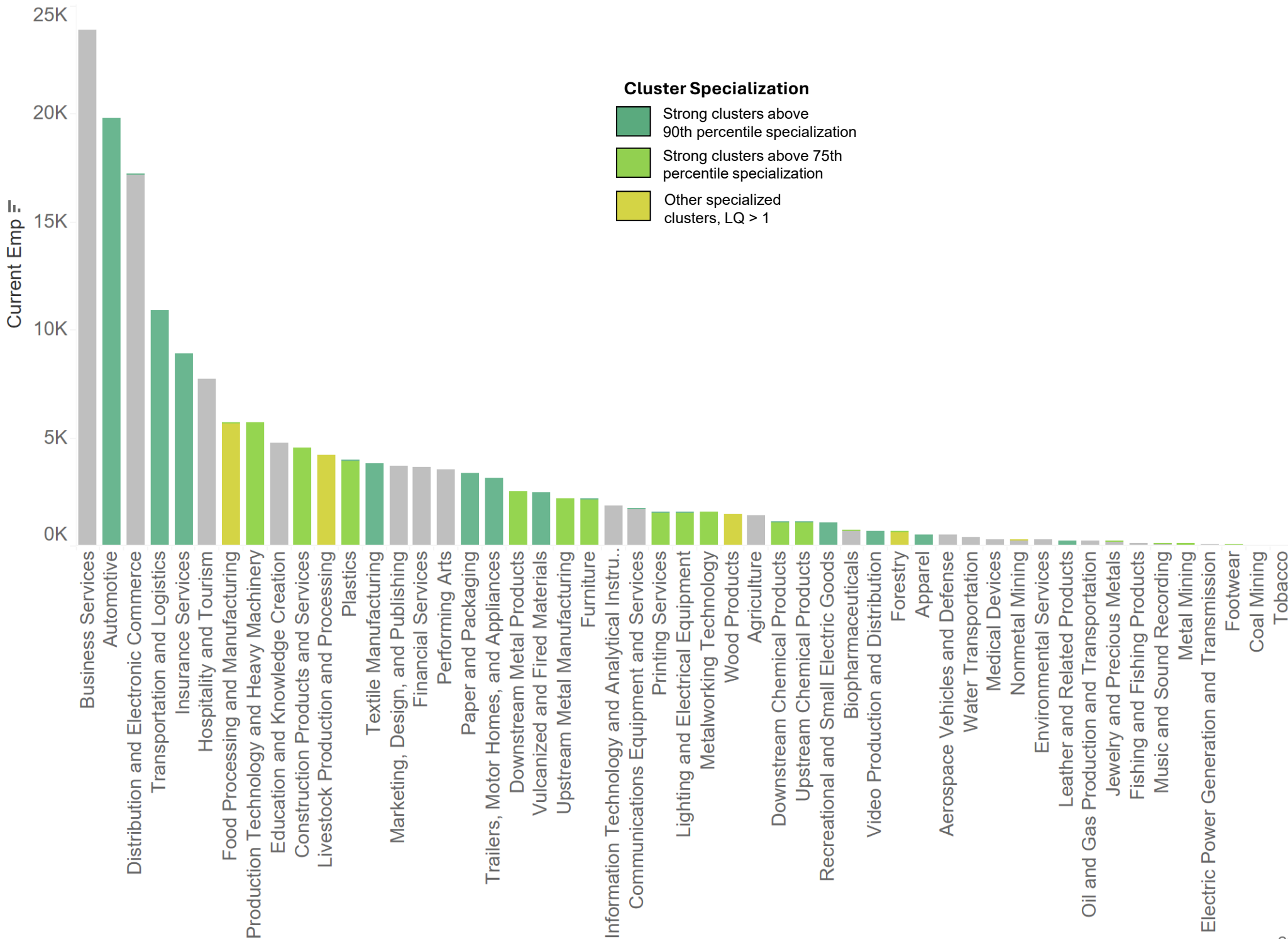
	Local	Traded
Regional Employment	64.7%	35.3%
US Employment	65.7%	34.3%

Chattanooga Relative Wages, 2024

	Local	Traded	Total
Regional Wage	52,726	78,124	58,973
US Wage	57,413	101,199	72,465
Percent of US	91.8%	77.2%	81.4%

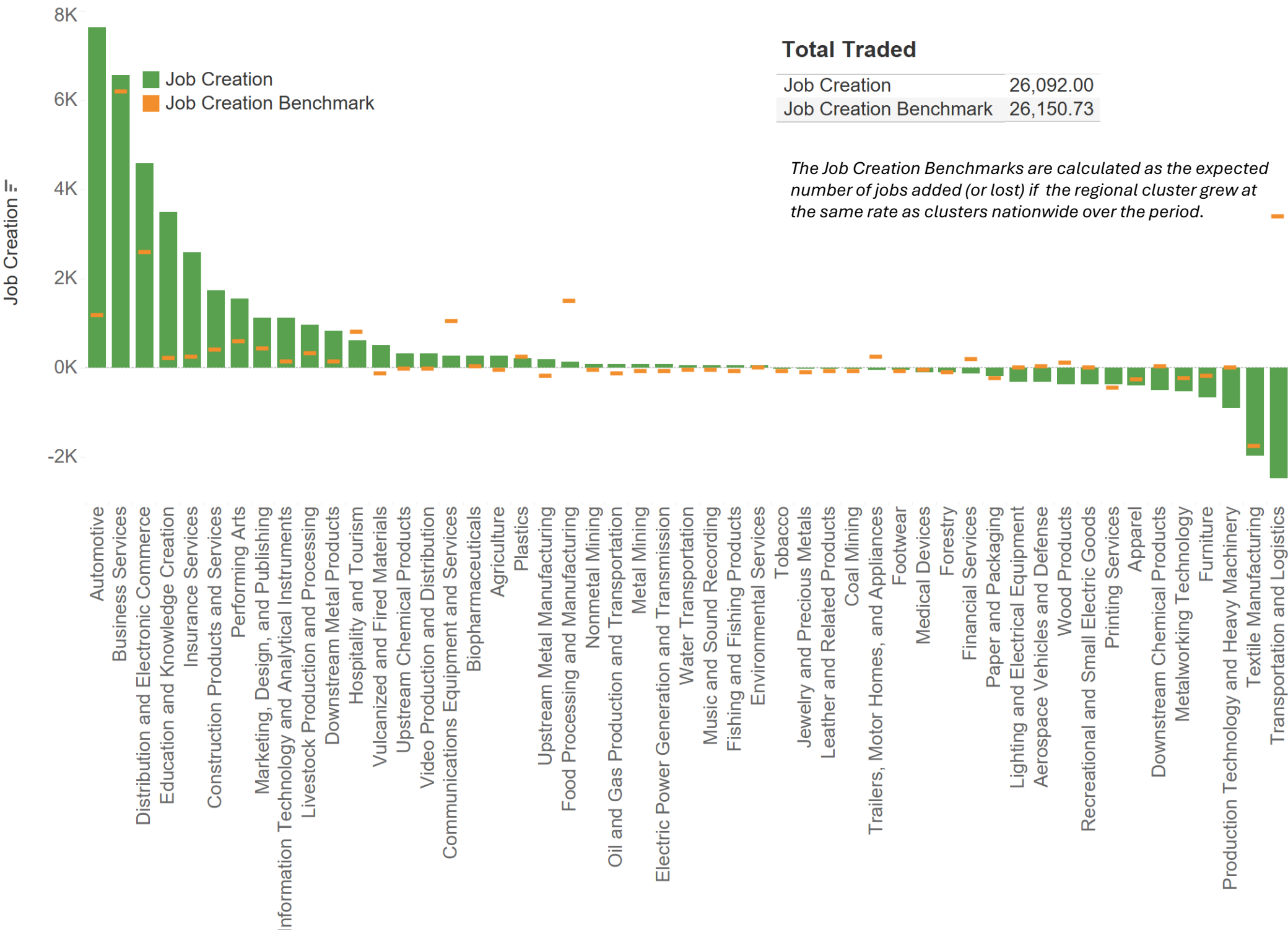


Chattanooga - Employment in Traded Clusters, 2024

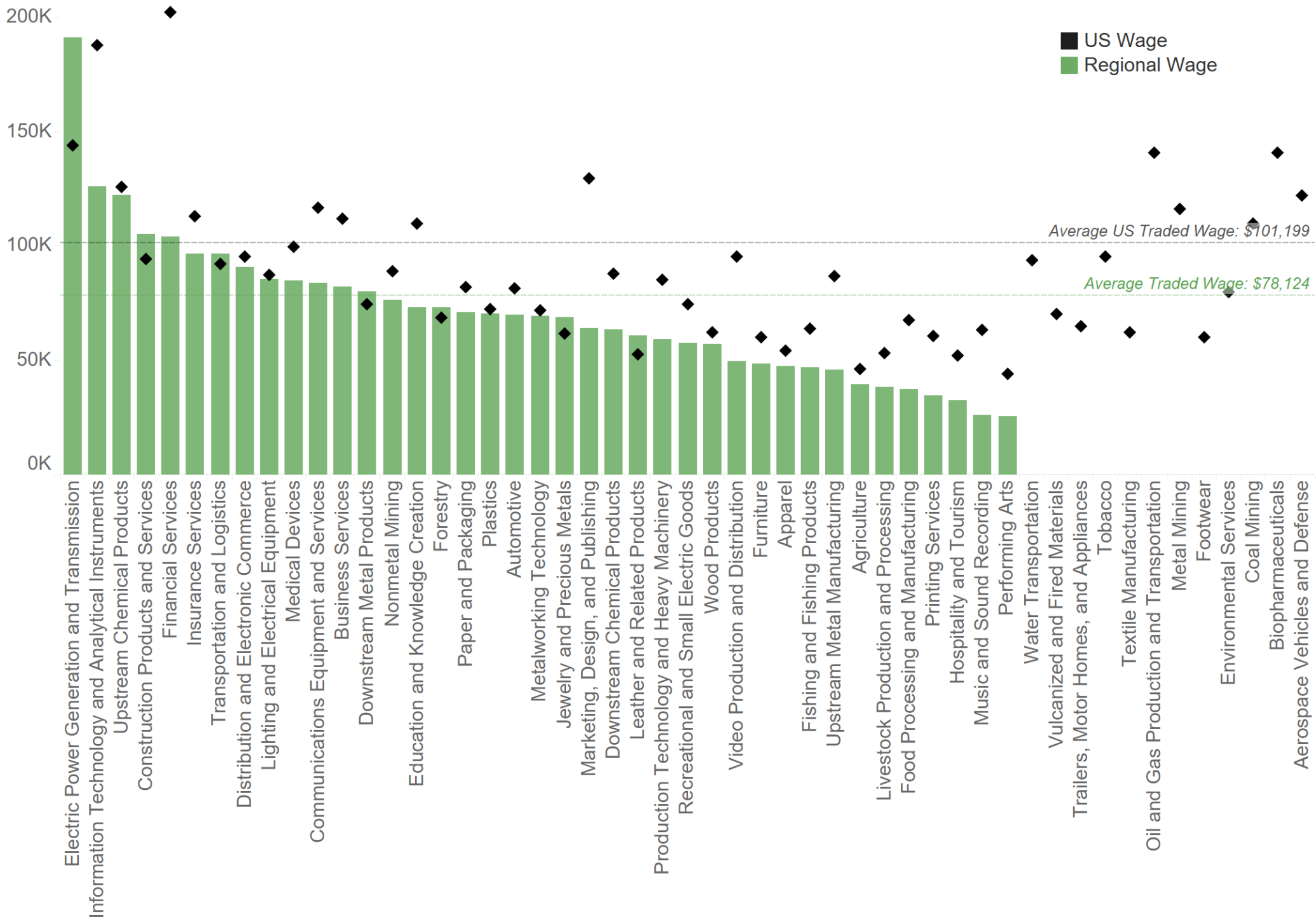


Source: US Cluster Mapping Project; BLS QCEW; Census NES – private employment

Chattanooga - Job Creation in Traded Clusters, 2014-2024

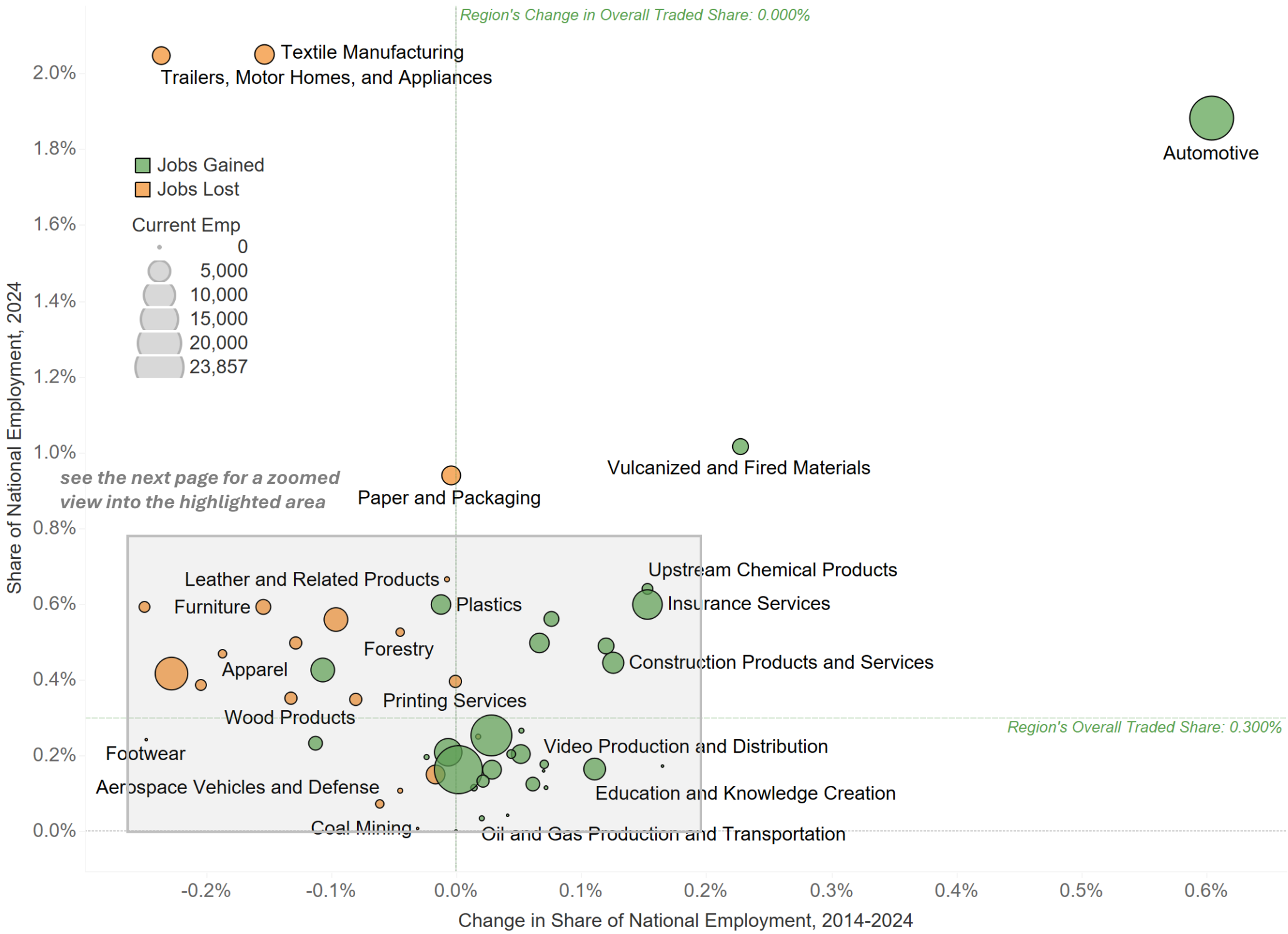


Chattanooga - Wages in Traded Clusters, 2024

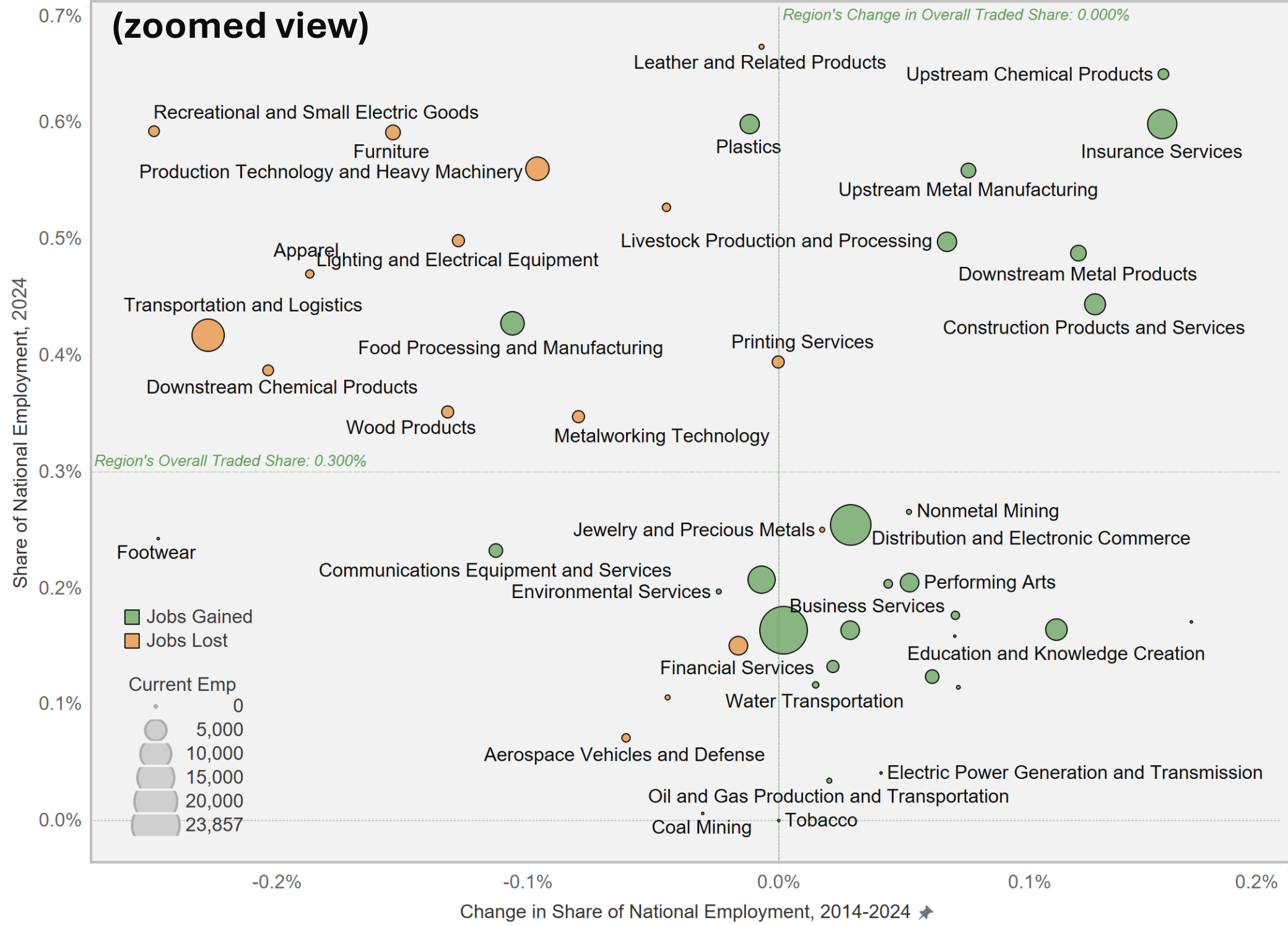


Source: US Cluster Mapping Project; BLS QCEW; Census NES – private employment

Zone 3: Chattanooga - Specialization in Traded Clusters, 2014-2024



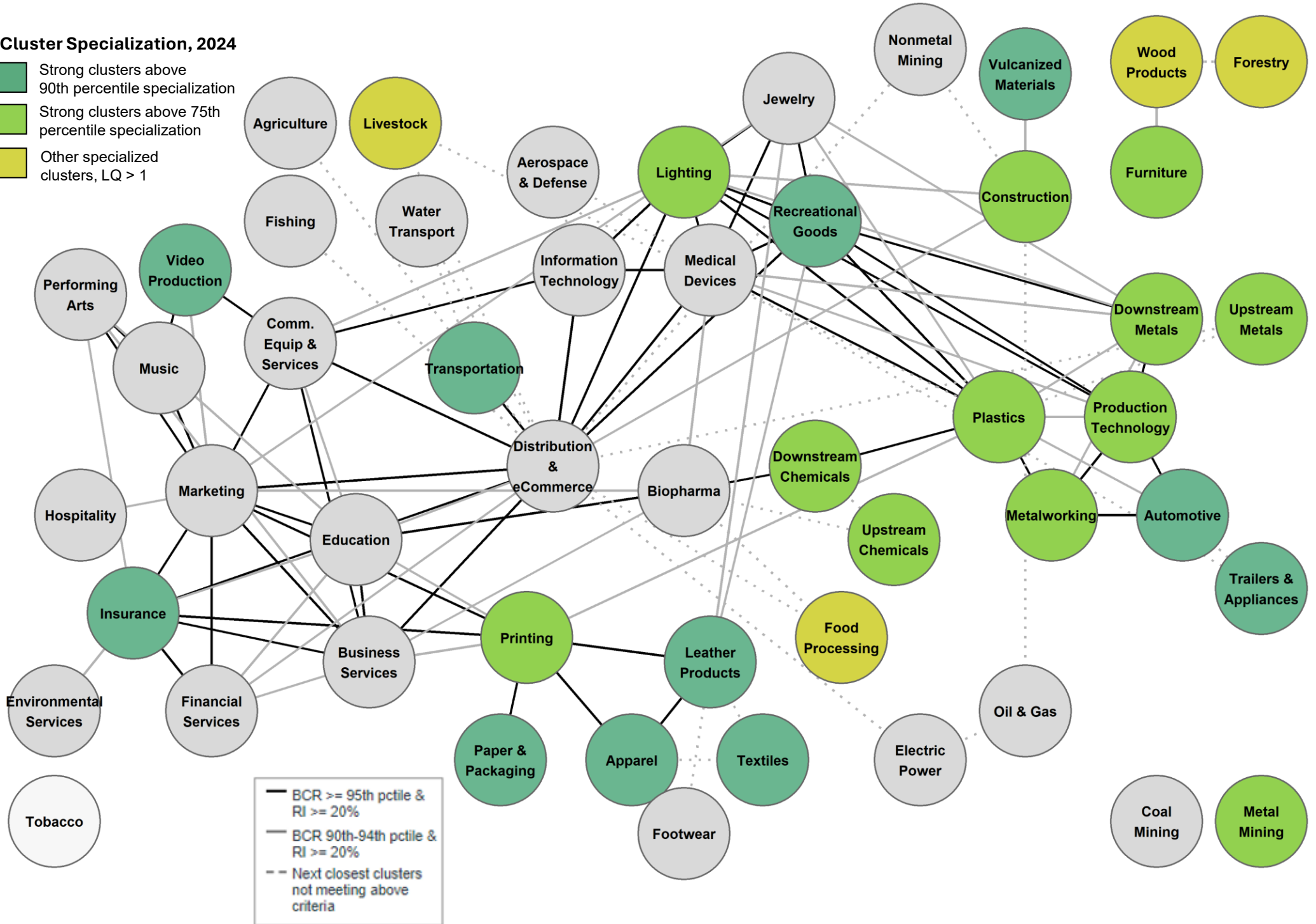
Zone 3: Chattanooga - Specialization in Traded Clusters, 2014-2024



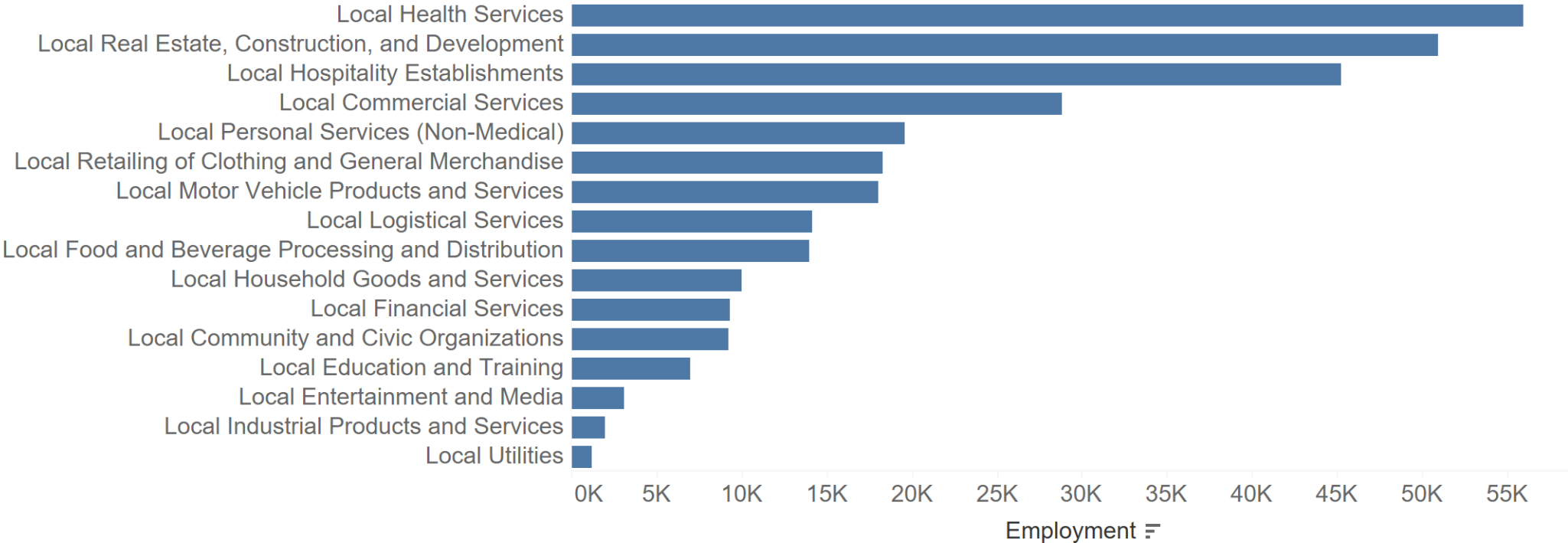
Chattanooga Cluster Linkages and Economic Diversification

Cluster Specialization, 2024

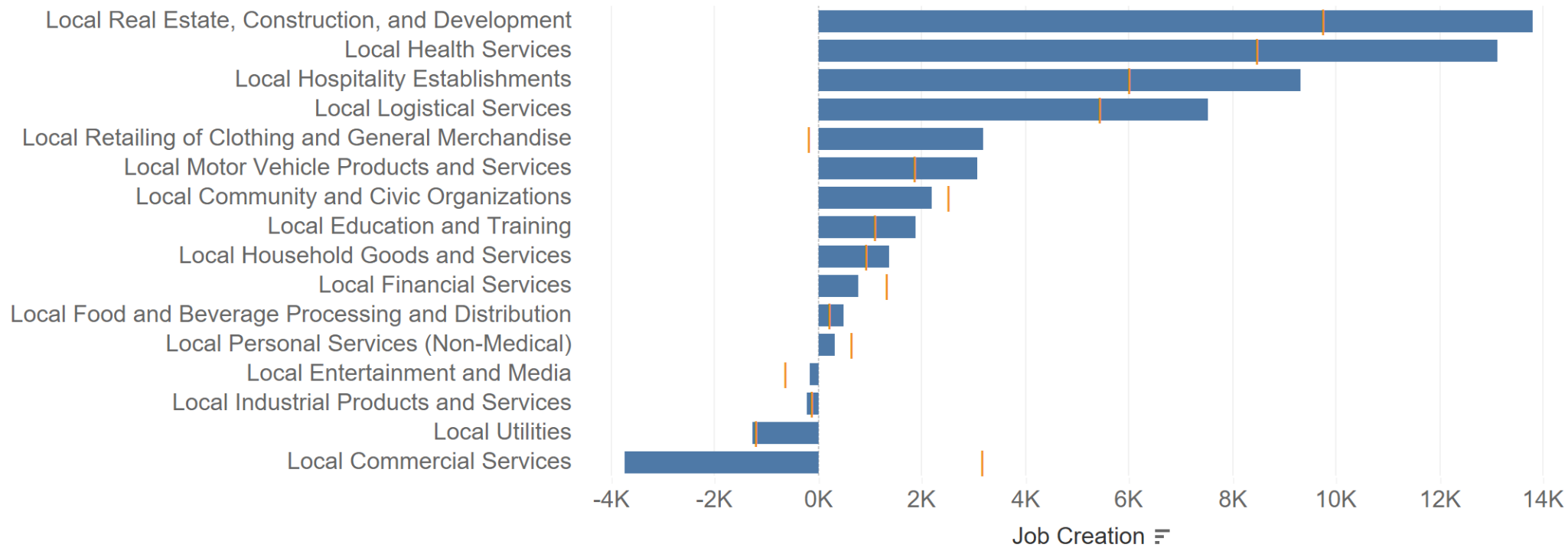
- Strong clusters above 90th percentile specialization
- Strong clusters above 75th percentile specialization
- Other specialized clusters, LQ > 1



Chattanooga - Employment in Local Clusters, 2024



Chattanooga - Job Creation in Local Cluster, 2014-2024

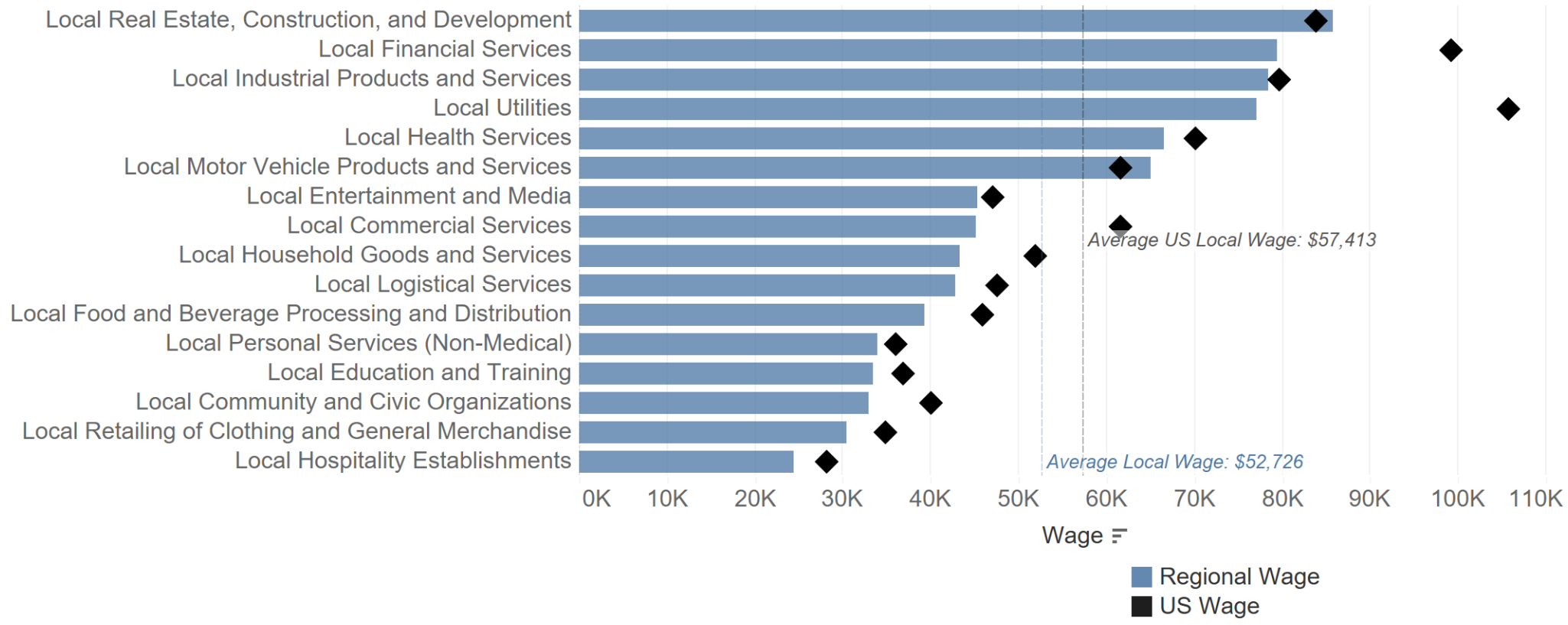


Total Local

Job Creation	51,651
Job Creation Benchmark	40,882

The Job Creation Benchmarks are calculated as the expected number of jobs added (or lost) if the regional cluster grew at the same rate as clusters nationwide over the period.

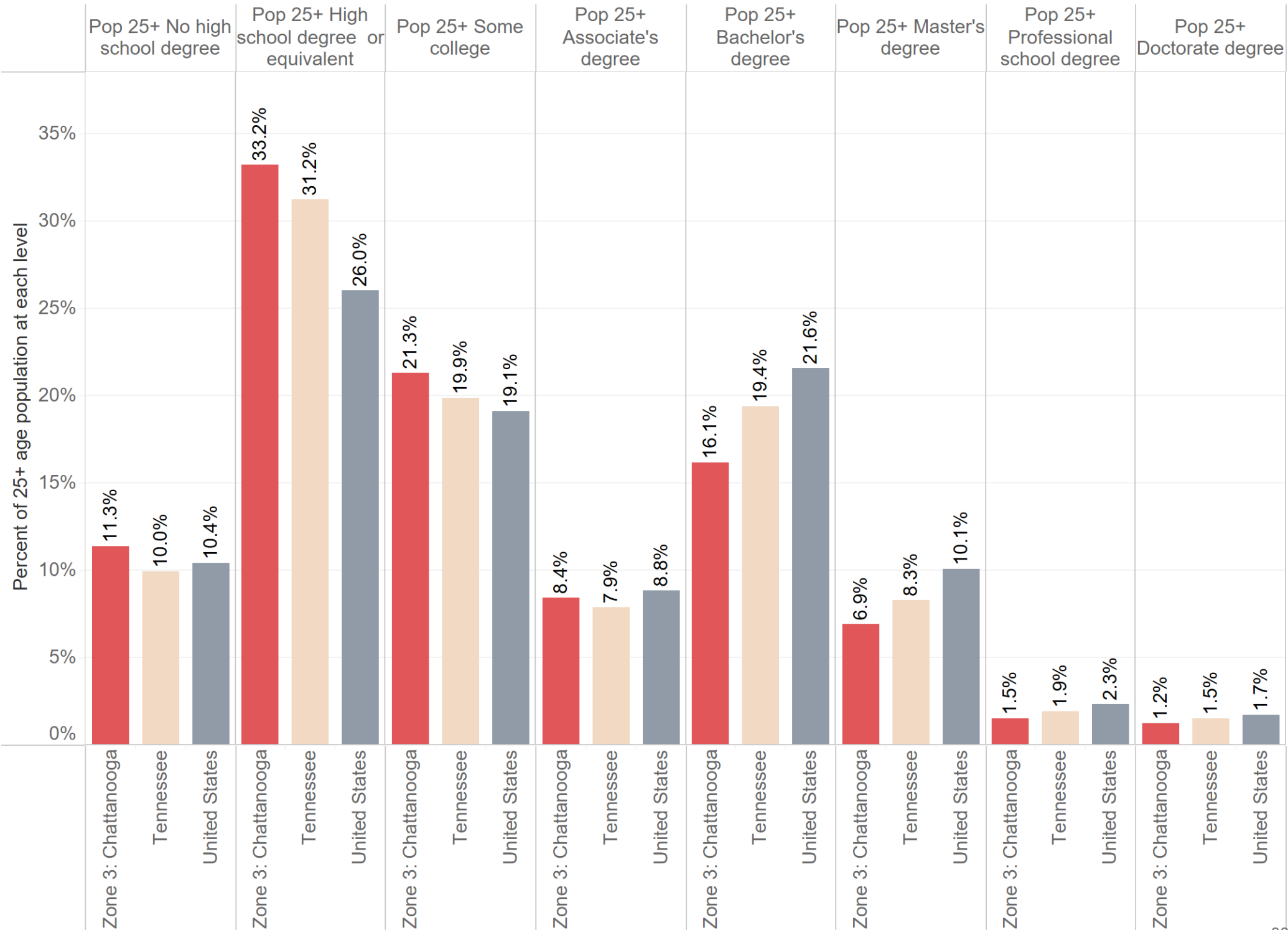
Chattanooga - Wages in Traded Clusters, 2024



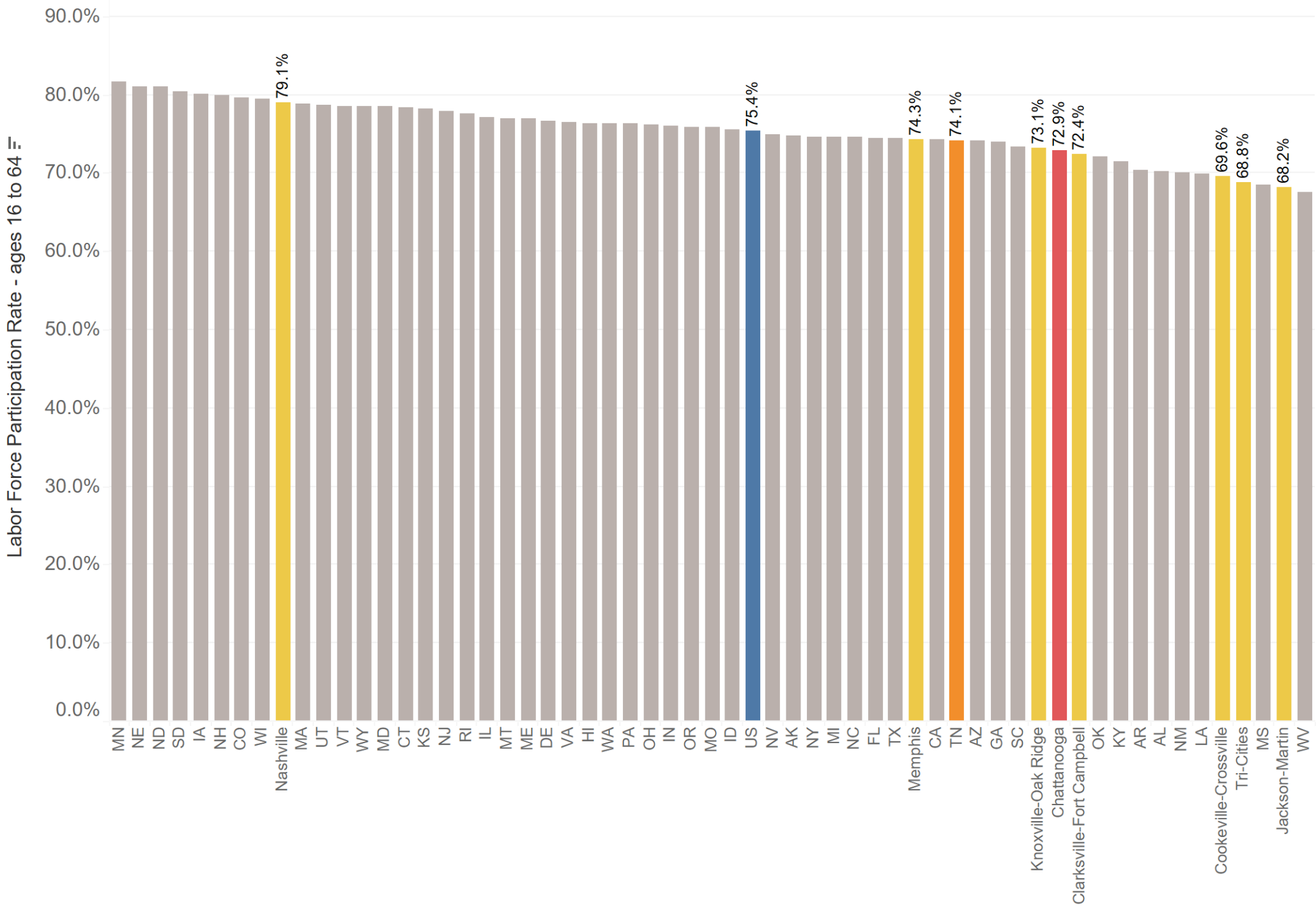
Education and Workforce

Educational Attainment	page 33
Labor Force Participation Rate	page 34
Labor Force Participate Rate Level and Change	page 35
Labor Force Participation Rate by Age	page 36
Population Growth	page 37
Population Growth Timeline	page 38
Unemployment Rate Level and Change	page 39

Educational Attainment, 2024

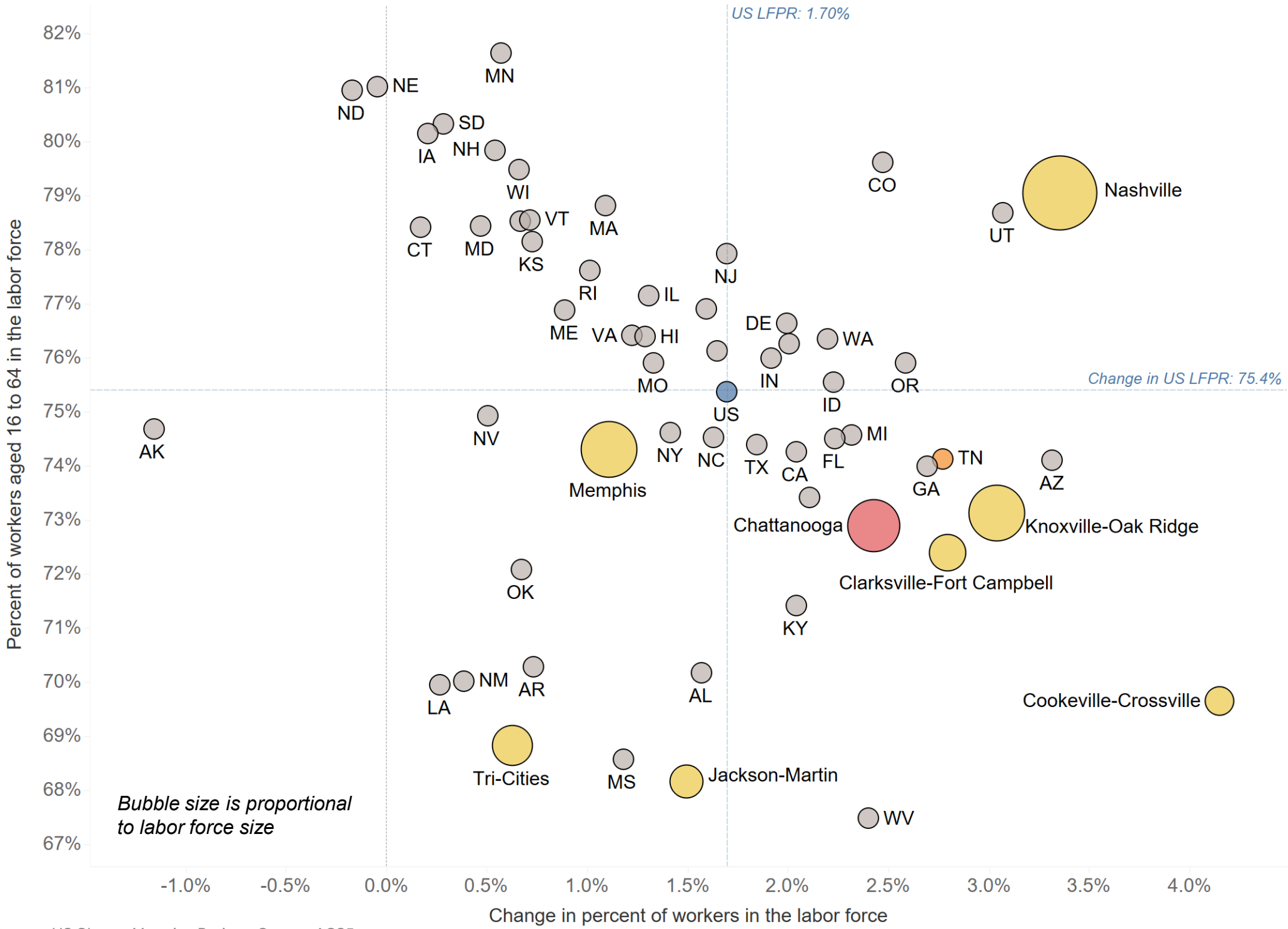


Labor Force Participation Rate - ages 16 to 64, 2024



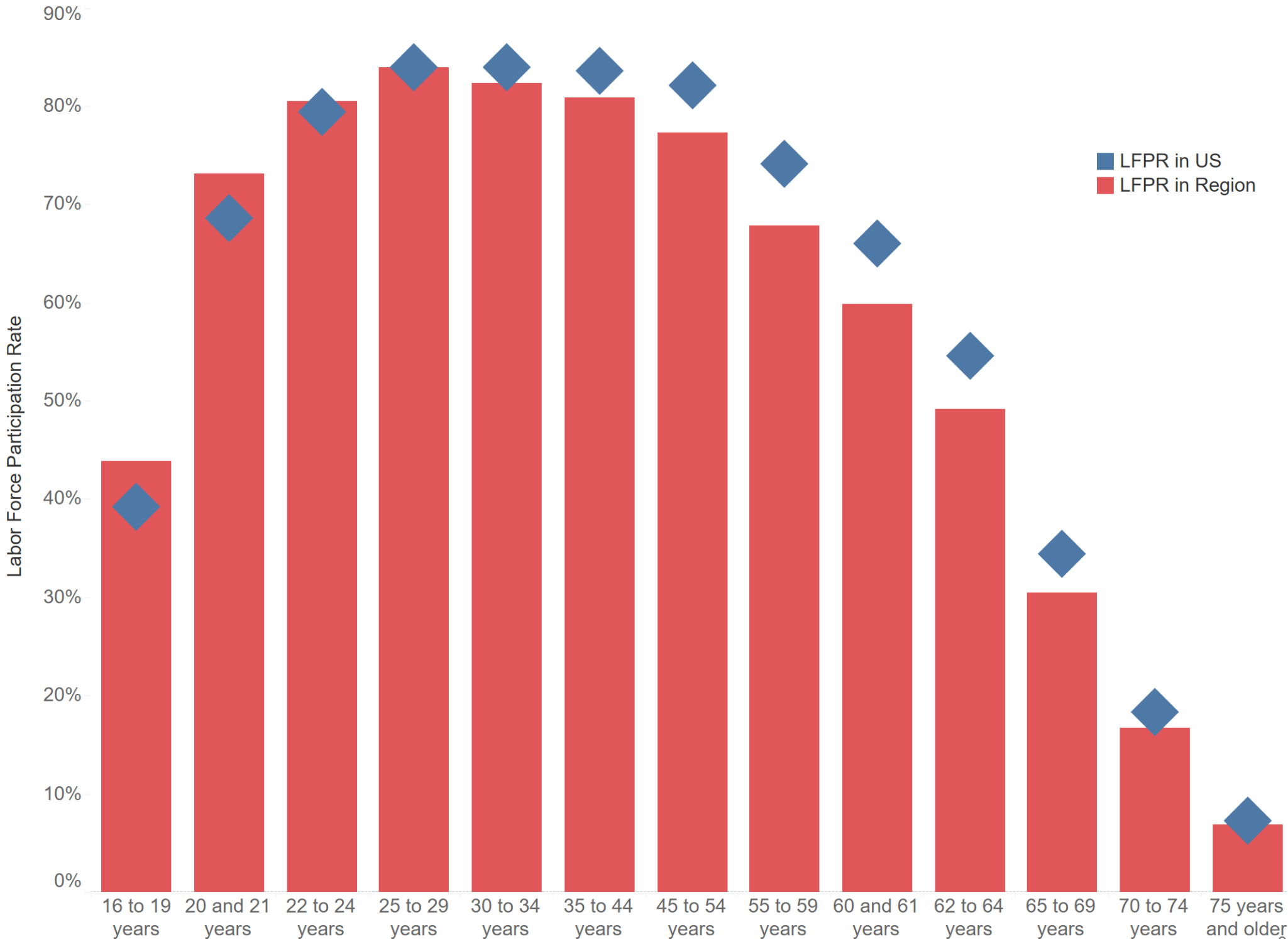
Source: US Cluster Mapping Project; Census ACS5

Labor Force Participation Rate - ages 16 to 64, 2014-2024



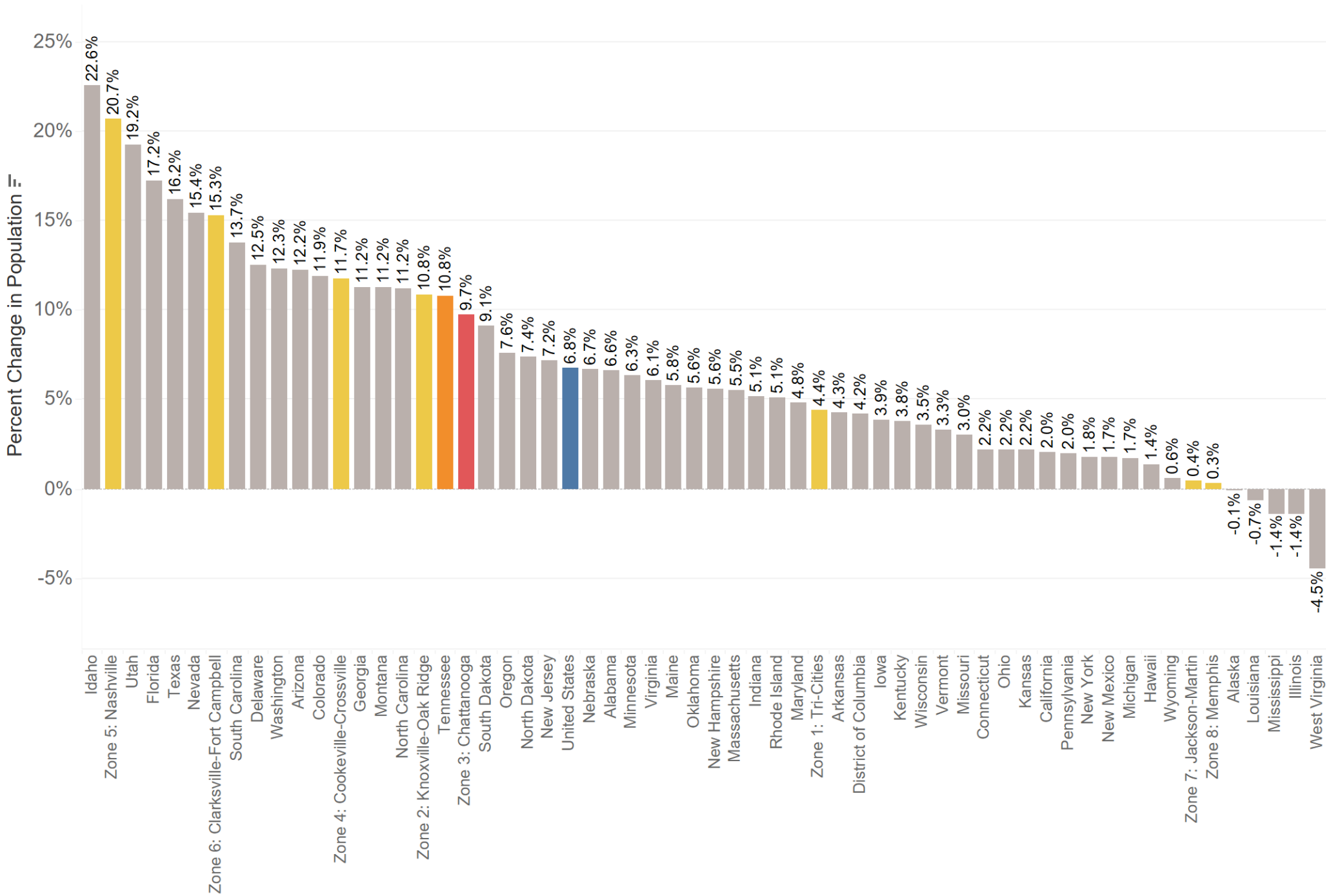
Source: US Cluster Mapping Project; Census ACS5

Chattanooga: Labor Force Participation Rate by Age, 2024

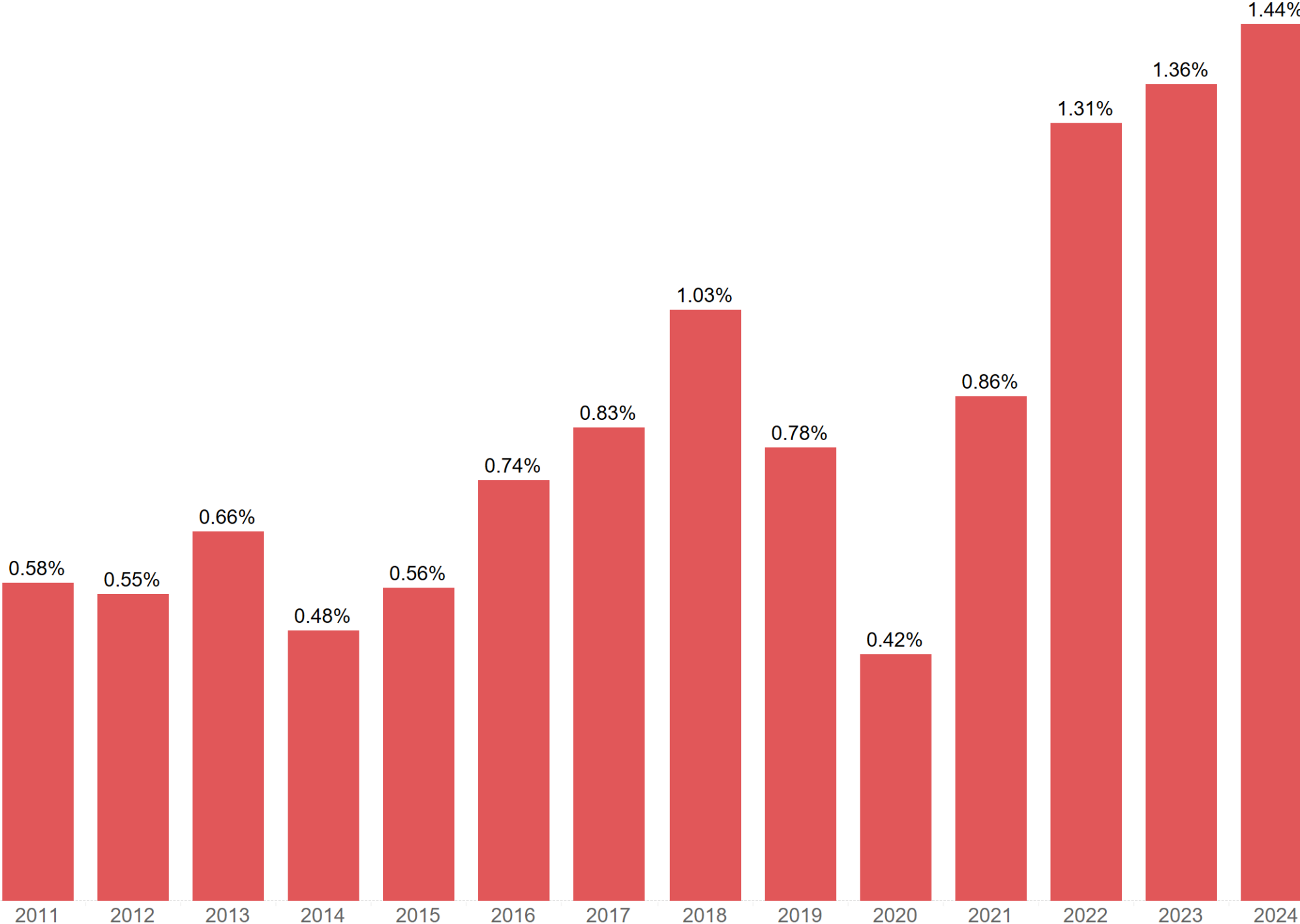


Source: US Cluster Mapping Project; Census ACS5

Population Percent Change, 2014-2024



Zone 3: Chattanooga - Change in Population by Year



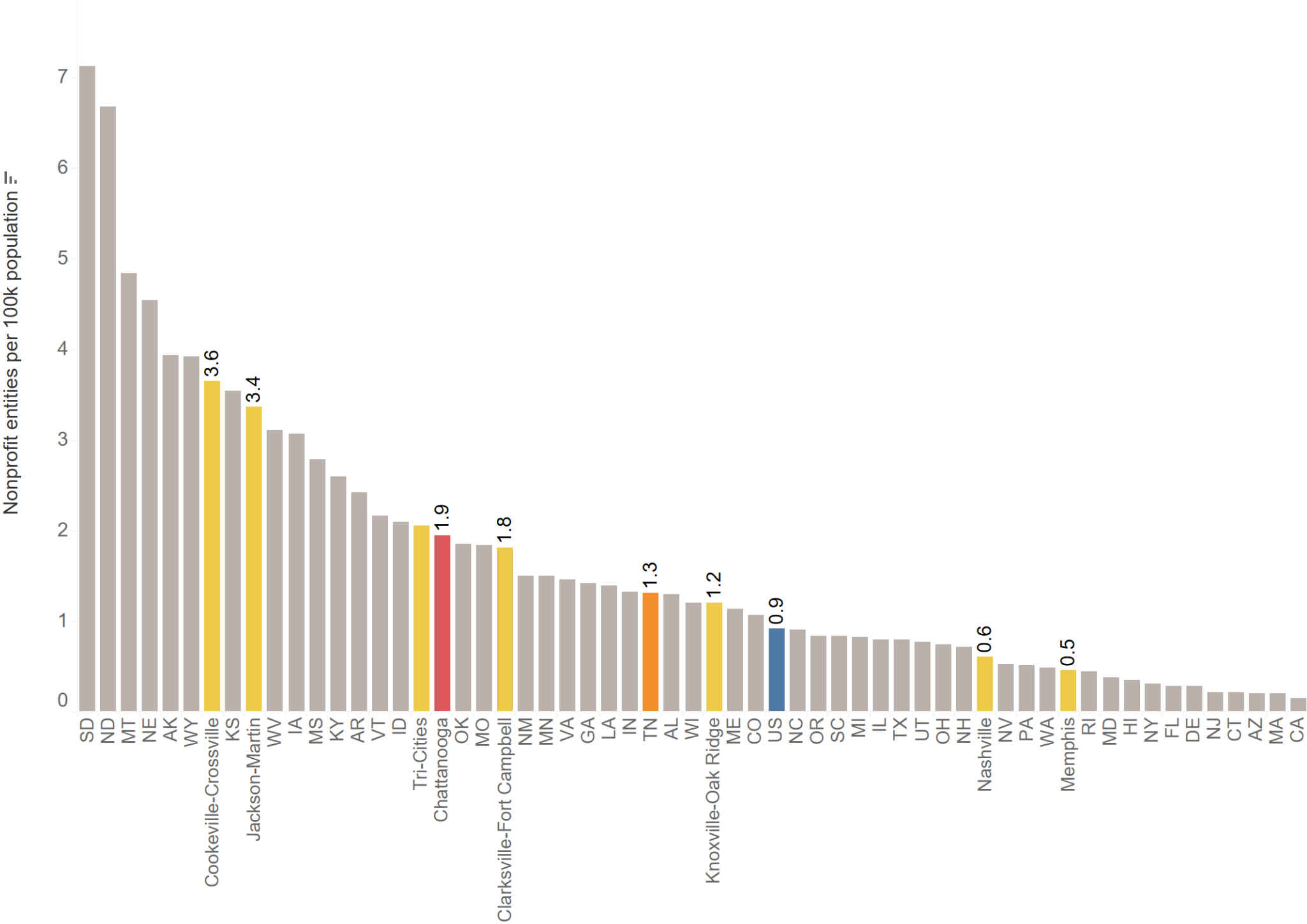
Unemployment Rate and Change, 2014-2024



Collaborative Governance

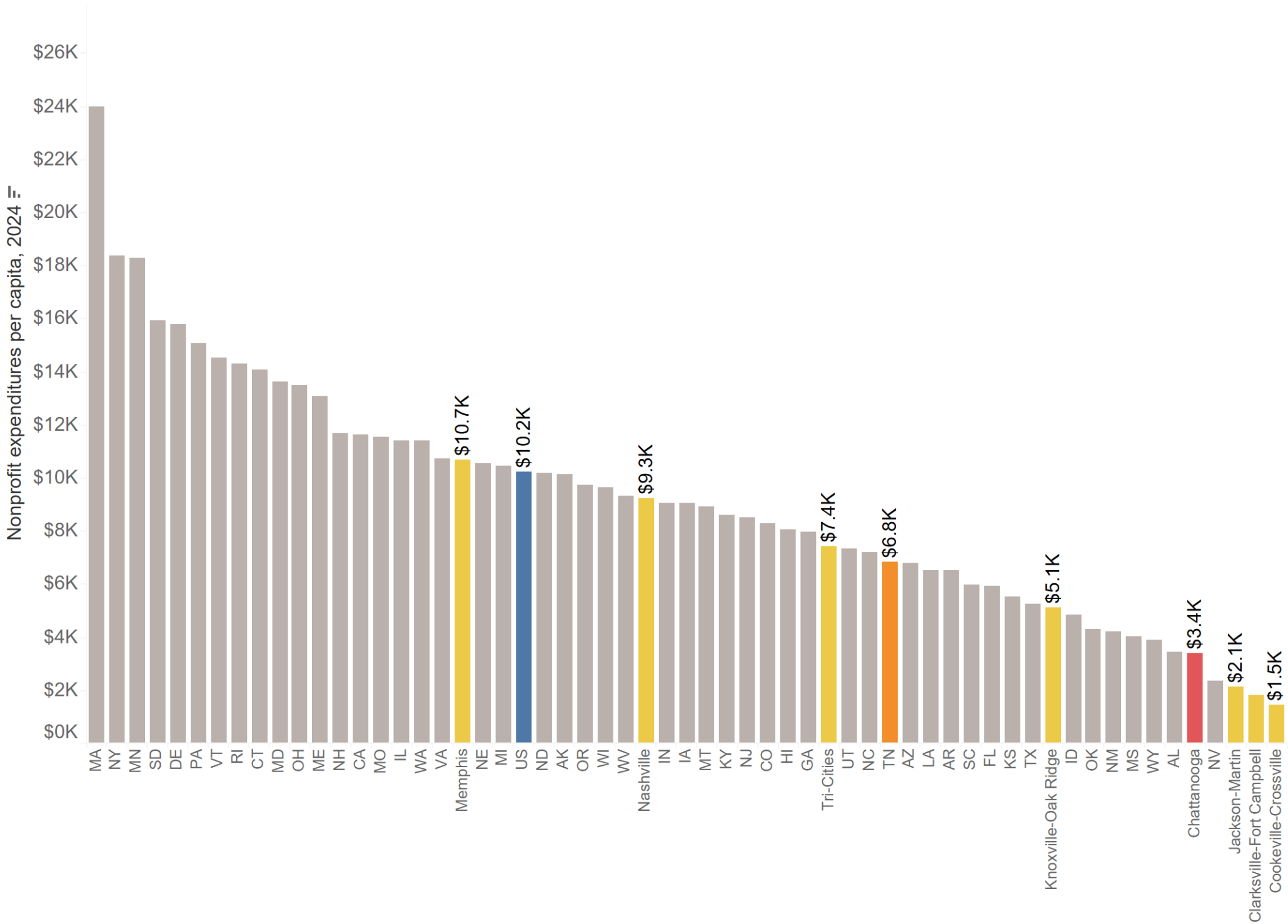
Nonprofits per Capita	page 41
Nonprofit Expenditures per Capita	page 42
Largest Nonprofits by Expenditure	page 43
TLAP Collaborative Governance Regional Inventory	page 44

Nonprofits per capita, 2024



Source: US Cluster Mapping Project; IRS 990, Census

Nonprofit Expenditures per Capita, 2024



Source: US Cluster Mapping Project; IRS 990, Census

Chattanooga: Nonprofits by Expenditures, 2024

	Expenditures (\$)
MEMORIAL HEALTH CARE SYSTEM INC	698,834,239
VOLUNTEER ENERGY COOPERATIVE	278,944,813
UNIVERSITY OF THE SOUTH	172,751,190
GUARDIAN FOUNDATION INC	163,558,519
LIFE CARE CENTERS OF AMERICA INC ASSOCIATE B..	152,979,910
MEMORIAL HEALTH PARTNERS FOUNDATION INC	150,208,487
LEE UNIVERSITY	93,462,606
TROUSDALE FOUNDATION INC	91,617,672
ORANGE GROVE CENTER INC	88,406,237
OPERATION COMPASSION A TENNESSEE NON-PRO..	77,845,738
OCOEE FOUNDATION INC	72,956,547
VOLUNTEER BEHAVIORAL HEALTH CARE SYSTEM	64,200,725
MCCALLIE SCHOOL INC	57,016,836
COVENANT COLLEGE INC	53,240,912
UNITY MEDICAL CENTER INC	51,347,295
THE BAYLOR SCHOOL	50,788,829
SISKIN HOSPITAL FOR PHYSICAL REHABILITATION	49,863,981
WEBB SCHOOL	41,348,578
BLOOD ASSURANCE INC	40,009,955
BUFFALO VALLEY INC	38,212,682
SOUTH CENTRAL HUMAN RESOURCE AGENCY INC	38,016,124
SIGNAL CENTERS INC	36,331,764
CHATTANOOGA CHRISTIAN COMMUNITY FOUNDATI..	35,283,633
CHATTANOOGA C A R E S INC	34,976,129
TENNESSEE WESLEYAN UNIVERSITY	34,150,125
CHATTANOOGA AREA FOOD BANK INC	32,780,809
COMMUNITY FOUNDATION OF GREATER CHATTANO..	29,127,013
BLED SOE TELEPHONE COOPERATIVE	28,836,197
TENNESSEE AQUARIUM	28,353,776
CHI MEMORIAL HOSPITAL - GEORGIA	26,920,213
CHATTANOOGA CHRISTIAN SCHOOL INC	26,391,625
BRYAN COLLEGE	26,155,144
LIFE BRIDGES INC	24,753,790
GIRLS PREPARATORY SCHOOL INC	23,475,292
FAMILY RESOURCE AGENCY INC	22,788,116

Excluding Health Care and Education

	Expenditures (\$)
LIFE CARE CENTERS OF AMERICA INC ASS..	152,979,910
ORANGE GROVE CENTER INC	88,406,237
OPERATION COMPASSION A TENNESSEE N..	77,845,738
VOLUNTEER BEHAVIORAL HEALTH CARE S..	64,200,725
BUFFALO VALLEY INC	38,212,682
CHATTANOOGA CHRISTIAN COMMUNITY F..	35,283,633
CHATTANOOGA AREA FOOD BANK INC	32,780,809
COMMUNITY FOUNDATION OF GREATER C..	29,127,013
TENNESSEE AQUARIUM	28,353,776
LIFE BRIDGES INC	24,753,790
GOODWILL INDUSTRIES OF THE GREATER ..	19,684,160
SOUTHEAST TENNESSEE HUMAN RESOUR..	19,540,239
PRECEPT MINISTRIES OF REACH OUT INC	15,057,934
THE TIVOLI THEATRE FOUNDATION INC	14,418,224
UNITED WAY OF GREATER CHATTANOOGA	11,687,249
ANKERBERG THEOLOGICAL RESEARCH IN..	11,290,157
CBMC INC	10,686,367
SKILLS DEVELOPMENT SERVICES INC	10,440,111
CARTER STREET CORPORATION	10,258,192
ENTERPRISE CENTER INC	9,546,145
FAMILY RESOURCE AGENCY INC	9,301,883
FRIENDS OF THE ZOO INC	9,183,786
UNIMPROVIDENT DISABILITY PLAN TR	8,588,856
A M G INTERNATIONAL	8,375,296
TENNESSEE VALLEY RAILROAD MUSEUM I..	8,094,799
SCORE INTERNATIONAL INC	7,100,138
THE ELEPHANT SANCTUARY IN TENNESSEE	6,850,060
CREATIVE DISCOVERY MUSEUM	5,887,534
MCKEE PARKS TRAILS AND GREENWAYS	5,871,234
PARTNERSHIP FOR FAMILIES CHILDREN A..	5,679,541
CHATTANOOGA CHAMBER FOUNDATION	5,527,535
CHATTANOOGA SYMPHONY AND OPERA A..	5,329,341
THE A I M CENTER INC	5,297,180
PROVIDENCE SENIOR LIVING INC	5,104,350
HUNTER MUSEUM OF ART	4,787,359

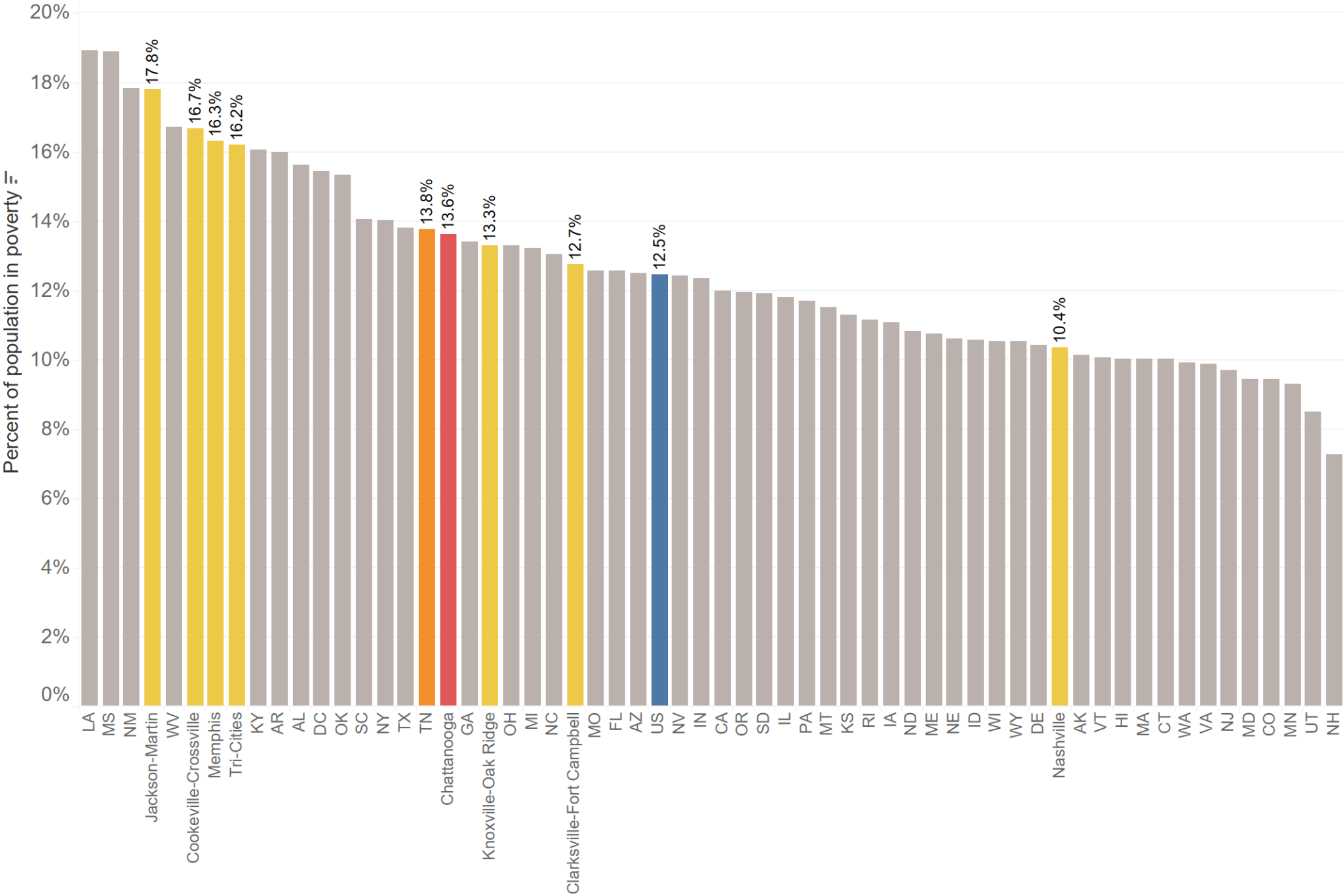
Chattanooga: TLAP Collaborative Governance Regional Inventory

Initiative	Mission Summary	Lead Organization	Counties Covered
Thrive Regional Partnership (Citizen-Led Tri-State Collaborative)	Build inclusive, sustainable growth across the tri-state Greater Chattanooga region through region-wide planning that aligns economic, environmental, and community priorities.	Thrive Regional Partnership (nonprofit civic organization)	Hamilton, Marion (TN); Catoosa, Dade, Walker (GA); portions of northeast Alabama
Southeast Tennessee Development District (SETD) & Regional Council of Governments	Provide regional governance through inter-local collaboration across government, education, and civic leaders to align development across 13 TN and GA counties.	Southeast Tennessee Development District (Council of Governments)	Bledsoe, Bradley, Grundy, Hamilton, Marion, McMinn, Meigs, Polk, Rhea, Sequatchie (TN); Catoosa, Dade, Walker (GA)
Chattanooga 2.0 Cradle-to-Career Initiative	Unite public, civic, education, and philanthropy partners to drive comprehensive outcomes for children from birth through college/career through integrated supports (e.g. City Connects, Success Plans).	Chattanooga 2.0 (backed by a children’s cabinet and the Chamber / United Way)	Hamilton County; regional spillover influence across MSA counties
Regional Health Council (Hamilton County and region-wide stakeholder body)	Guide county- and community-based health improvement planning in coordination with community providers, nonprofits, local government, and public health agencies.	Hamilton County Regional Health Council (advisory to Health Department)	Primarily Hamilton County, with frameworks informing neighboring counties in the MSA
Thrive Transportation Collaborative	Design long-term regional transportation solutions—including freight, workforce mobility, and digital connectivity—via cross-sector design teams representing public, private, nonprofit, and MPO stakeholders.	Thrive Regional Partnership (in collaboration with MPOs and local governments)	Greater Chattanooga region across TN and GA counties
Southeast High Impact Area (HIA) Substance Misuse Task Force	Lead multi-sector overdose prevention strategy and substance use recovery services through collective governance spanning public health, law enforcement, education, nonprofits, and treatment providers.	Tennessee Department of Health, Southeast Regional Office (SERO)	Bledsoe, Bradley, Grundy, Marion, McMinn, Meigs, Polk, Rhea, Sequatchie — led by Hamilton County coordination

Quality of Life

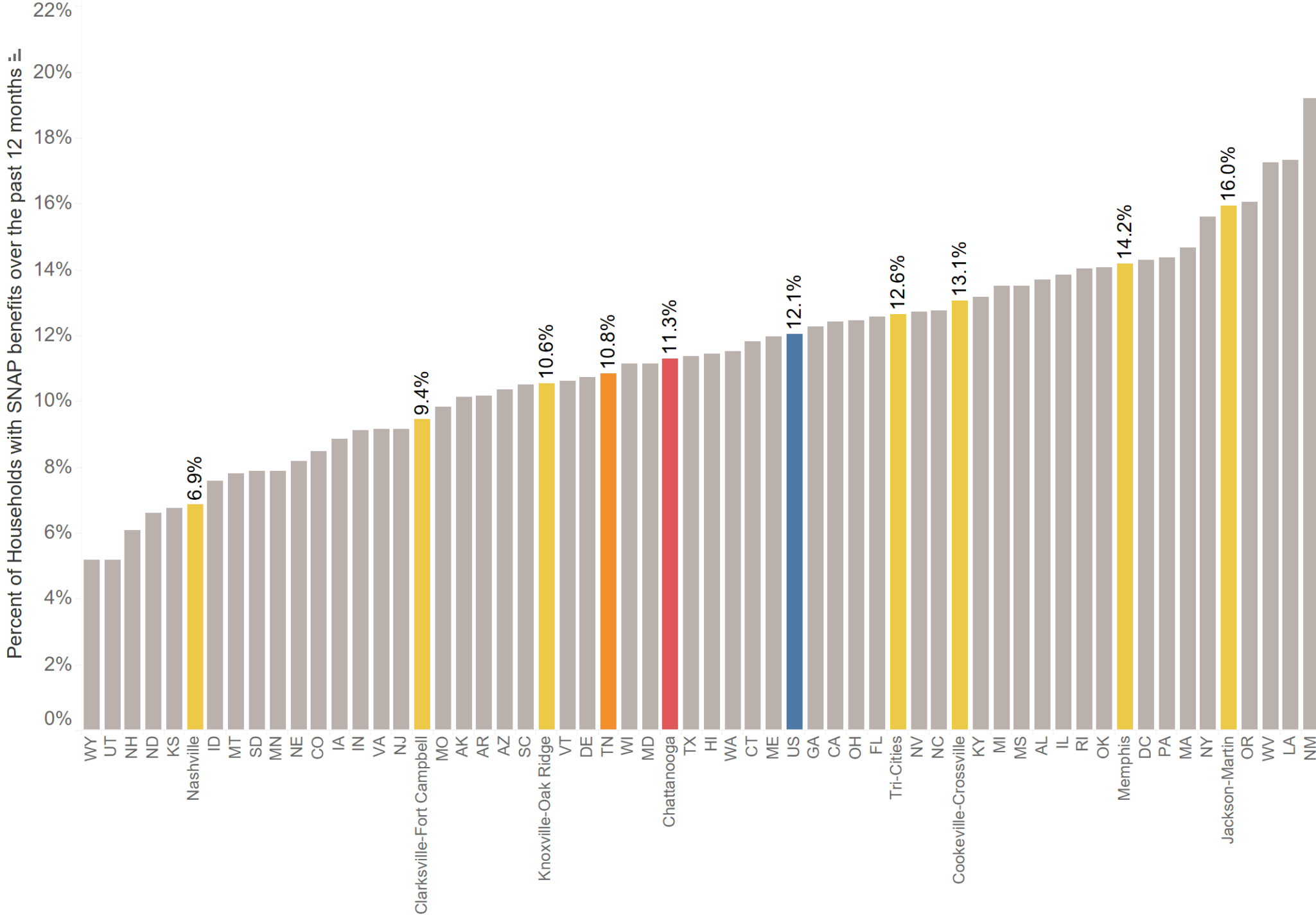
Poverty Rate	page 46
Poverty Rate Level and Change	page 47
Households Receiving SNAP Benefits	page 48
Violent Crime Rate	page 49
Adults in Correctional Facilities*	page 50
Drug Overdose Deaths	page 51
Broadband Adoption	page 52
Health Insurance Coverage	page 53
Workers with Long Commutes	page 54
Home Ownership Rate	page 55
Renewable and Nuclear Energy Production*	page 56
Renewable and Nuclear Energy Change*	page 57

Poverty Rate, 2024



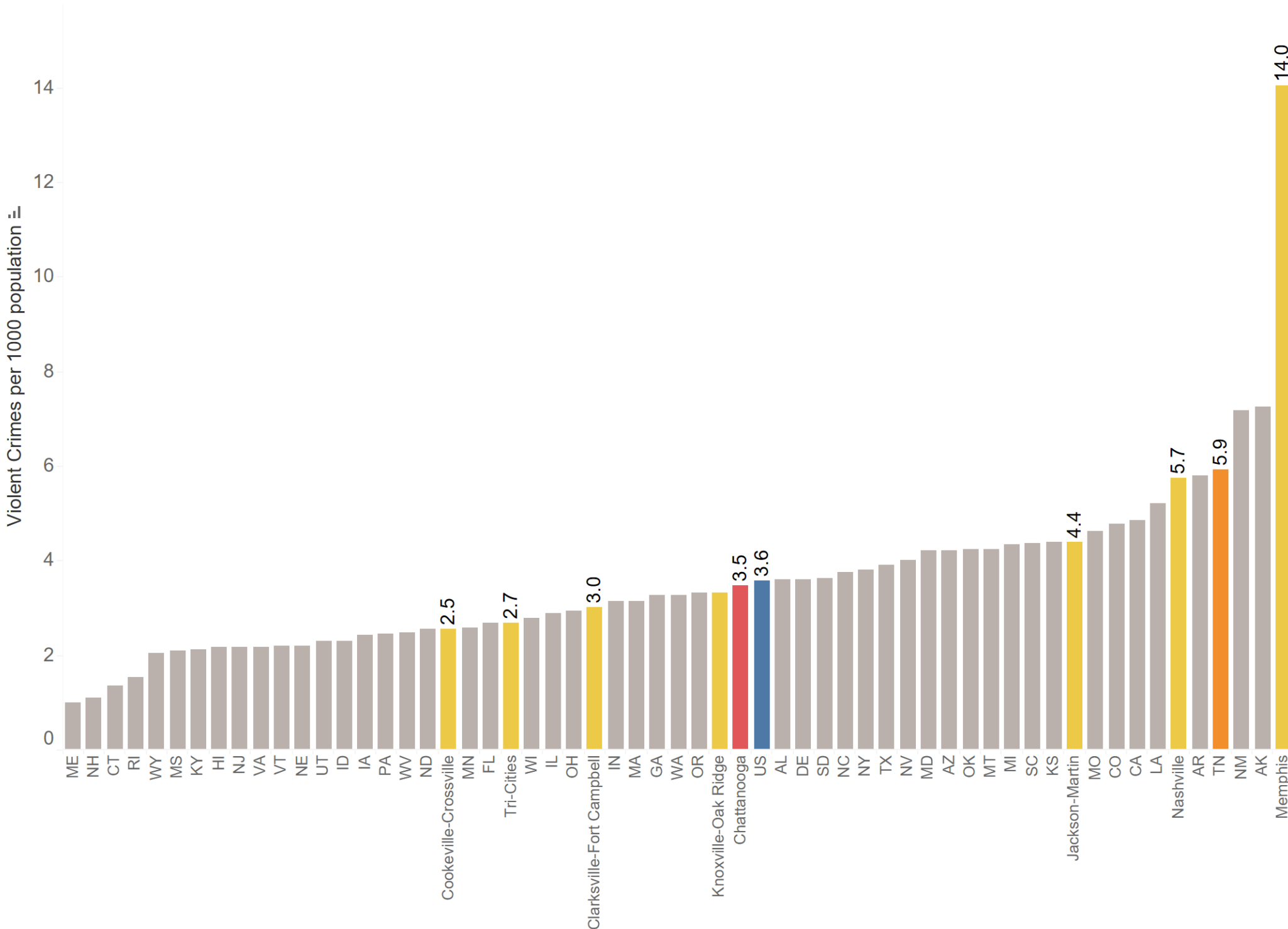
Source: US Cluster Mapping Project; ACS5

Households Receiving SNAP Benefits, 2024



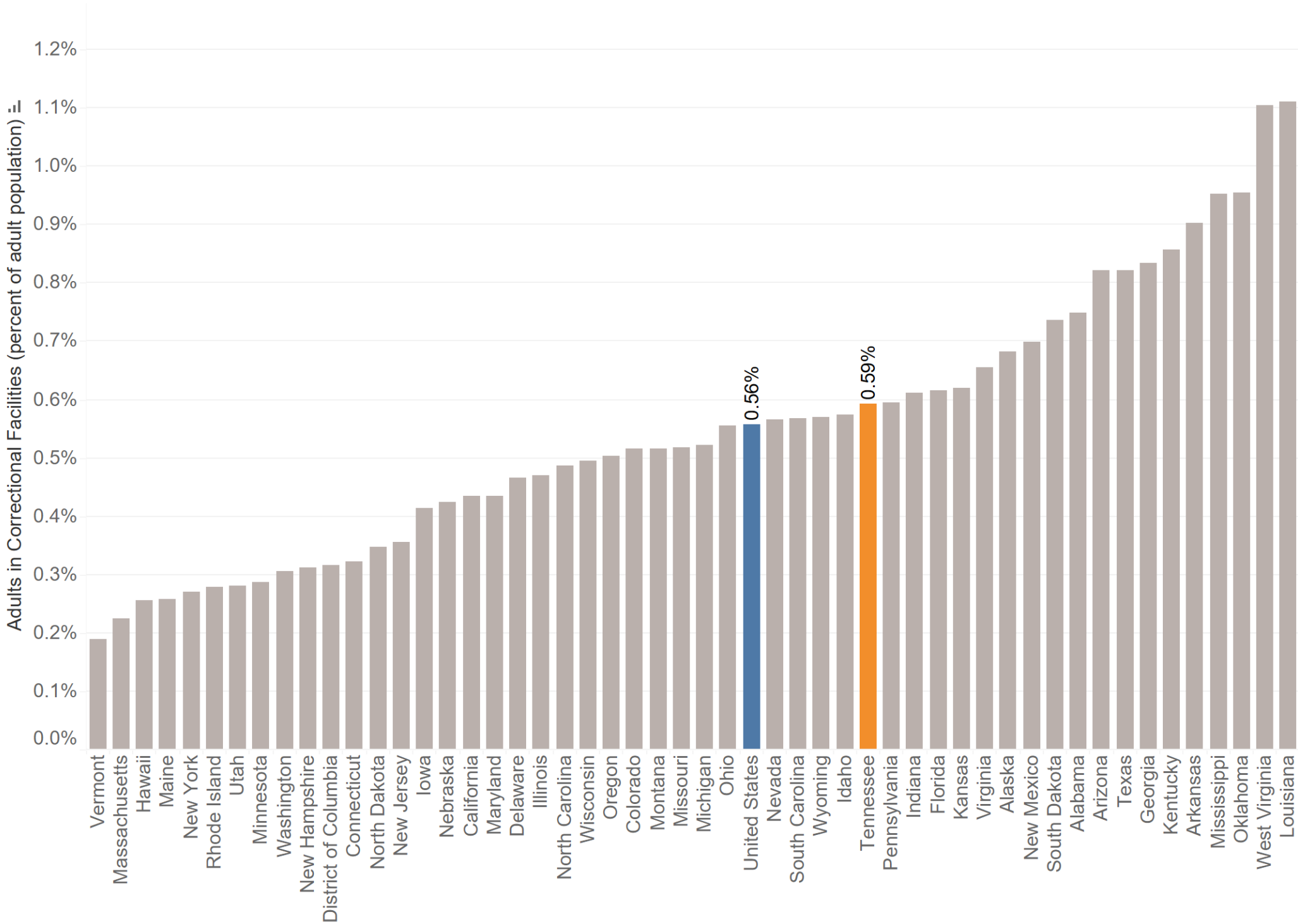
Source: US Cluster Mapping Project; Census ACS5

Violent Crime Rate, 2024

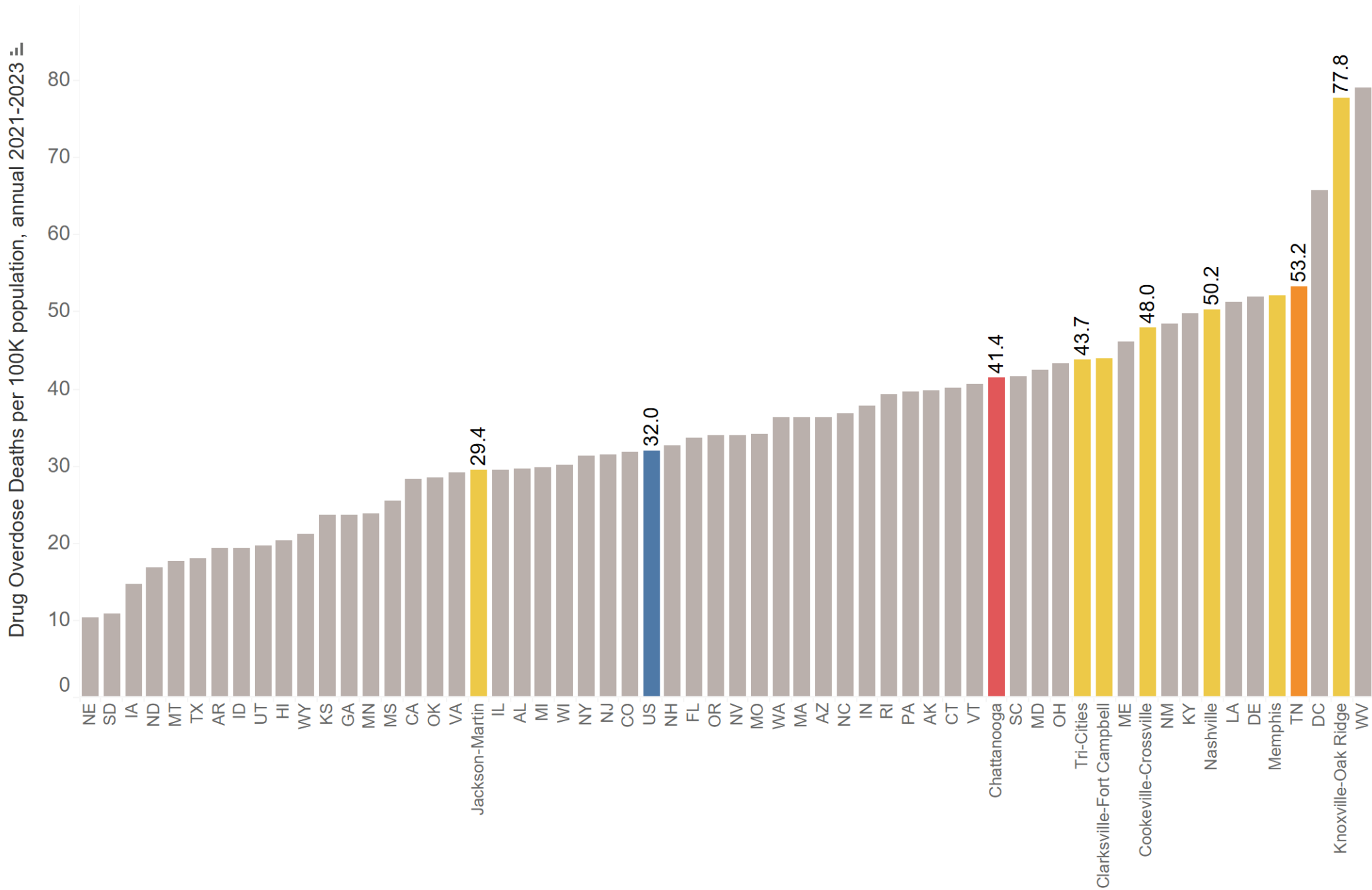


Source: US Cluster Mapping Project; FBI

Adults in Correctional Facilities, 2024

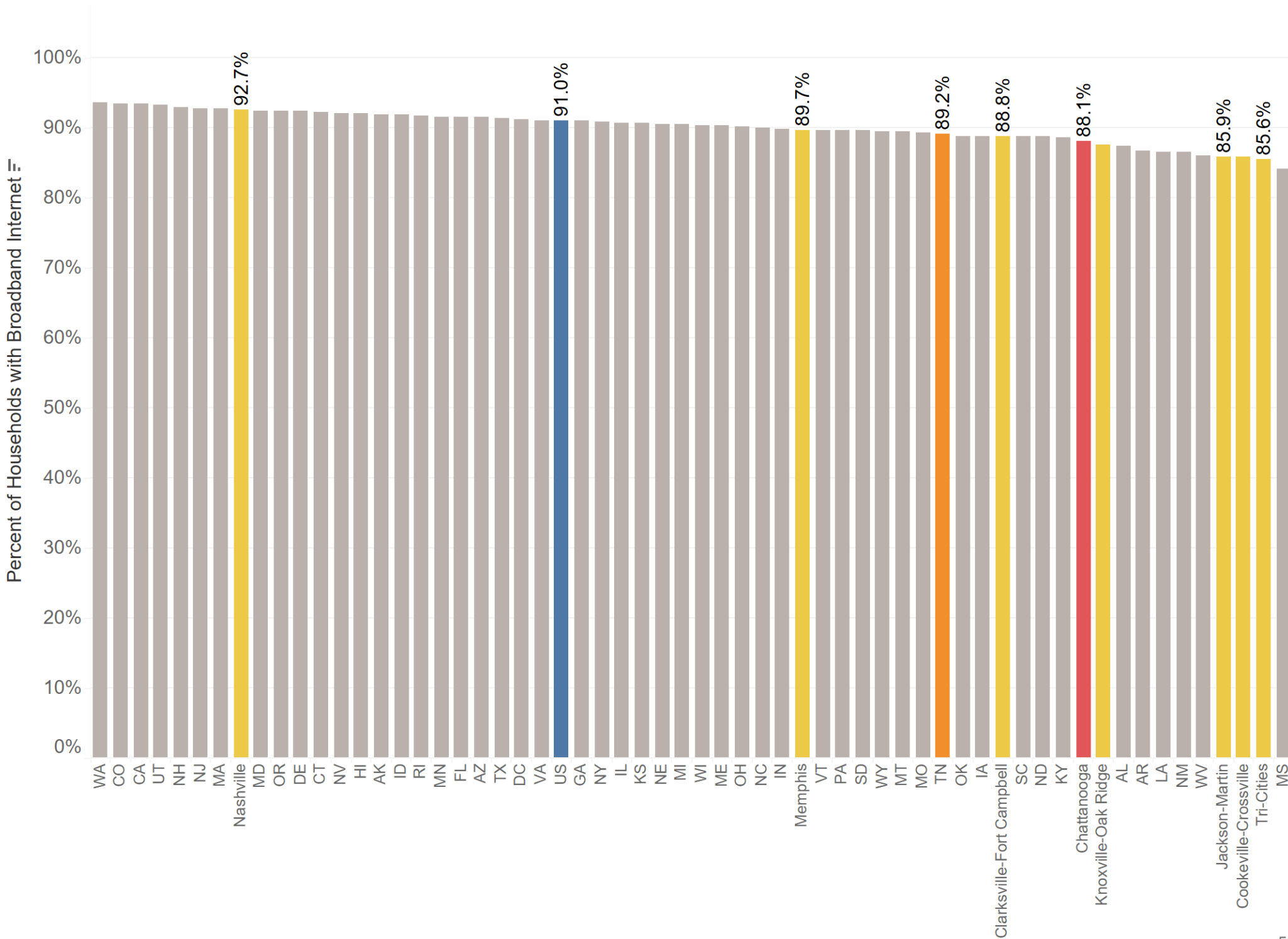


Drug Overdose Deaths per 100k Population average annual 2021-2023



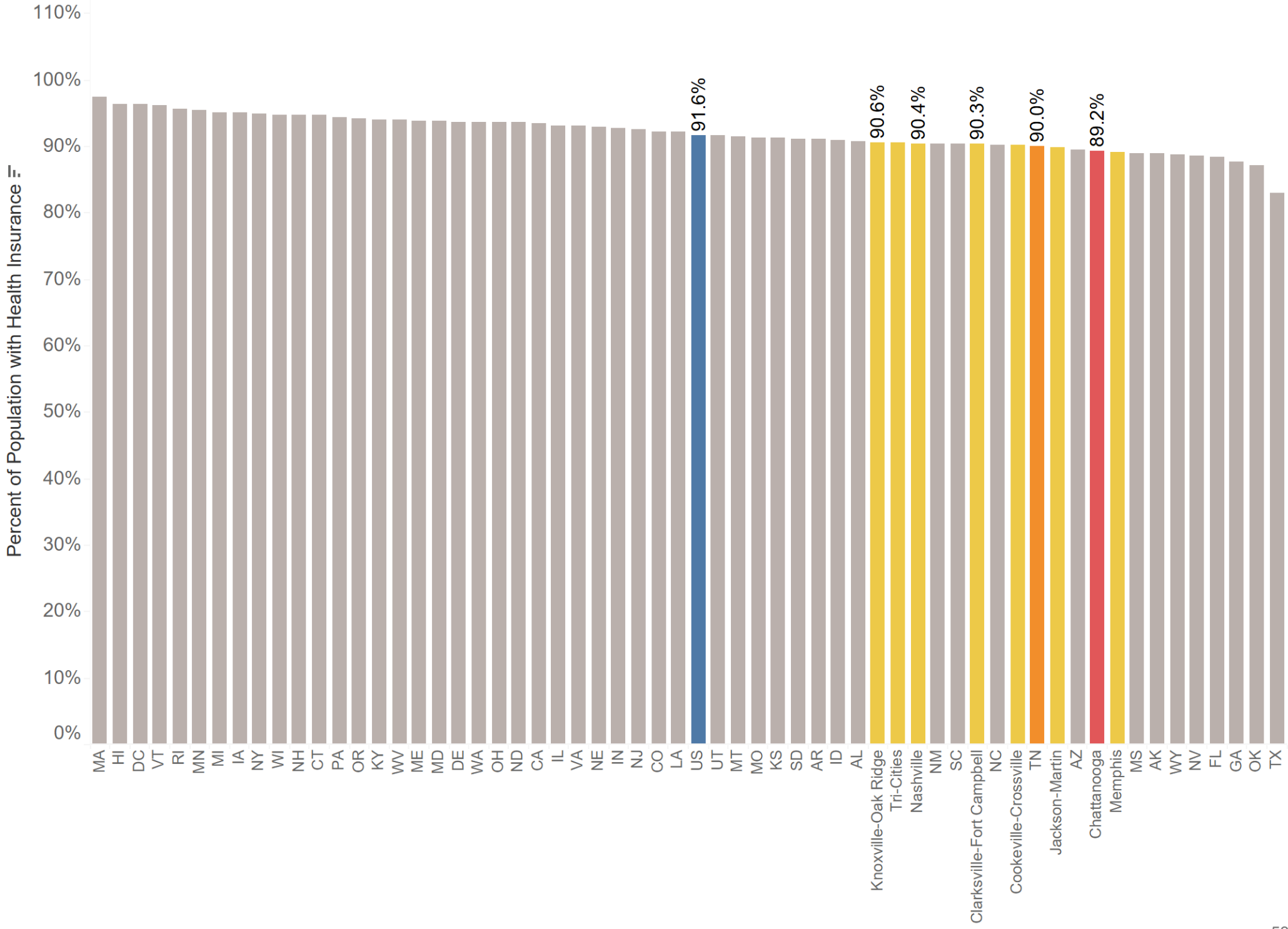
Source: US Cluster Mapping Project; CHRR. CDC, Census ACS

Broadband Adoption, 2024



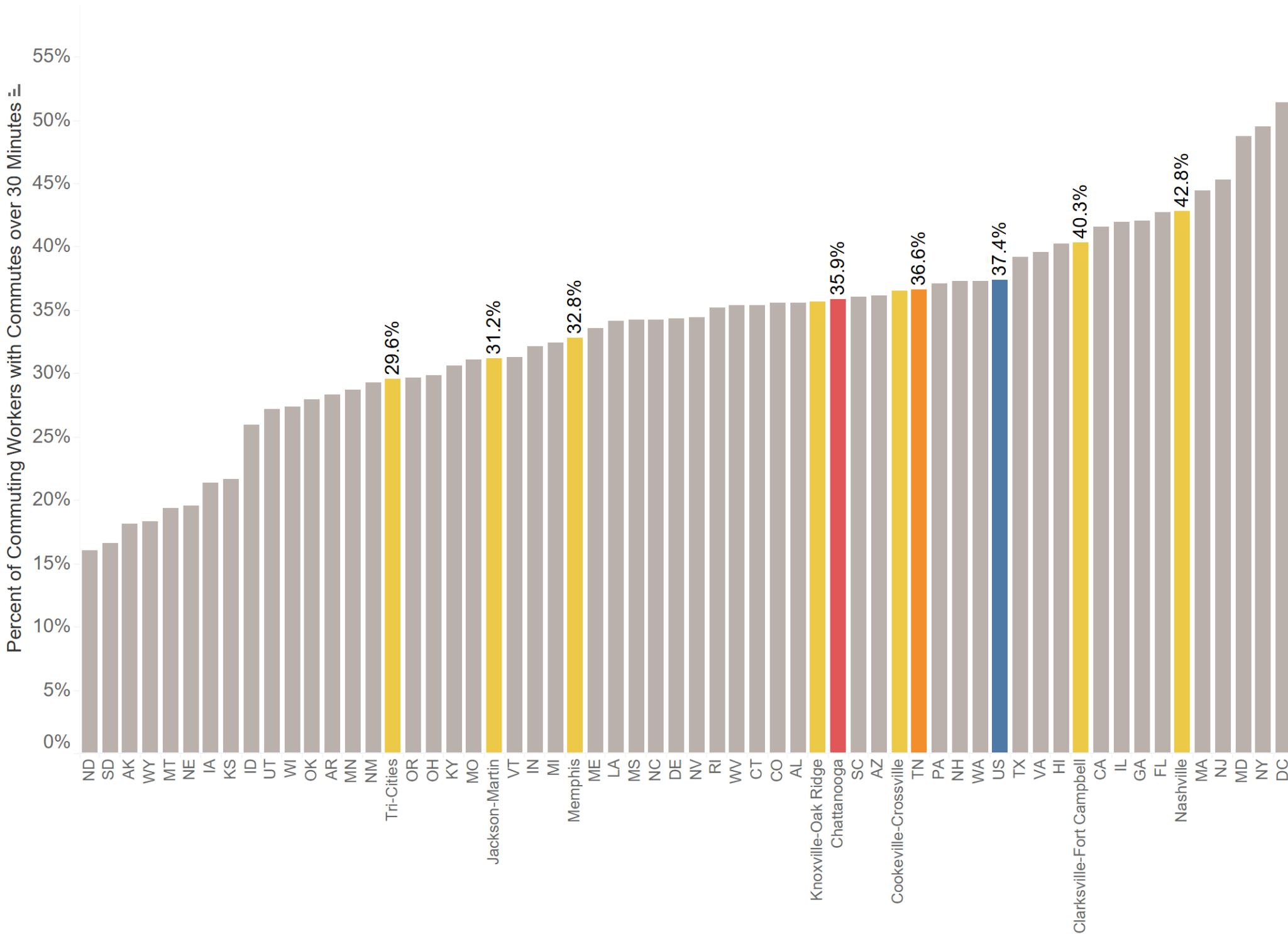
Source: US Cluster Mapping Project; Census ACS5

Health Insurance Coverage Rate, 2024



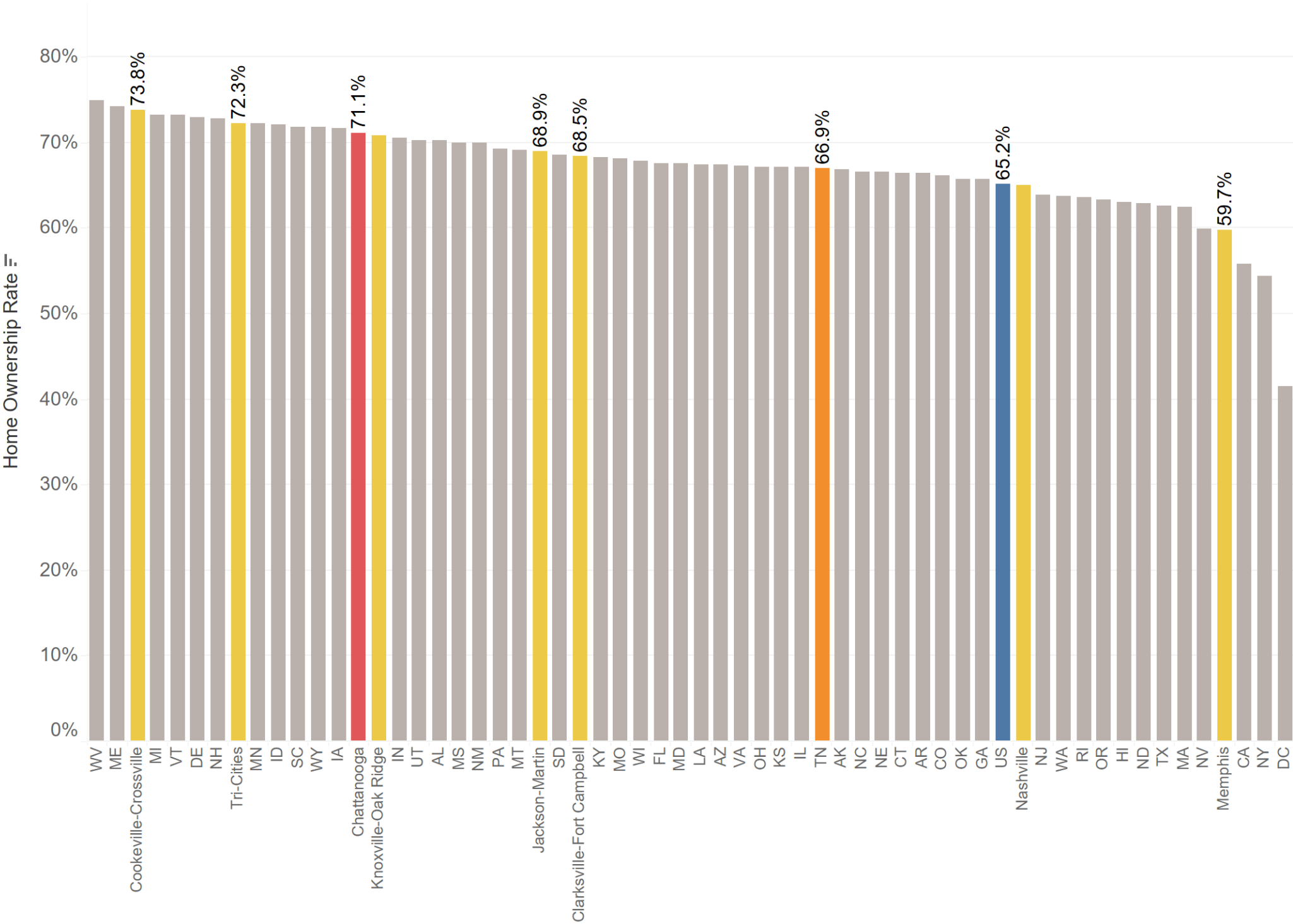
Source: US Cluster Mapping Project; Census ACS5

Percent of Workers with Long Commutes, 2024



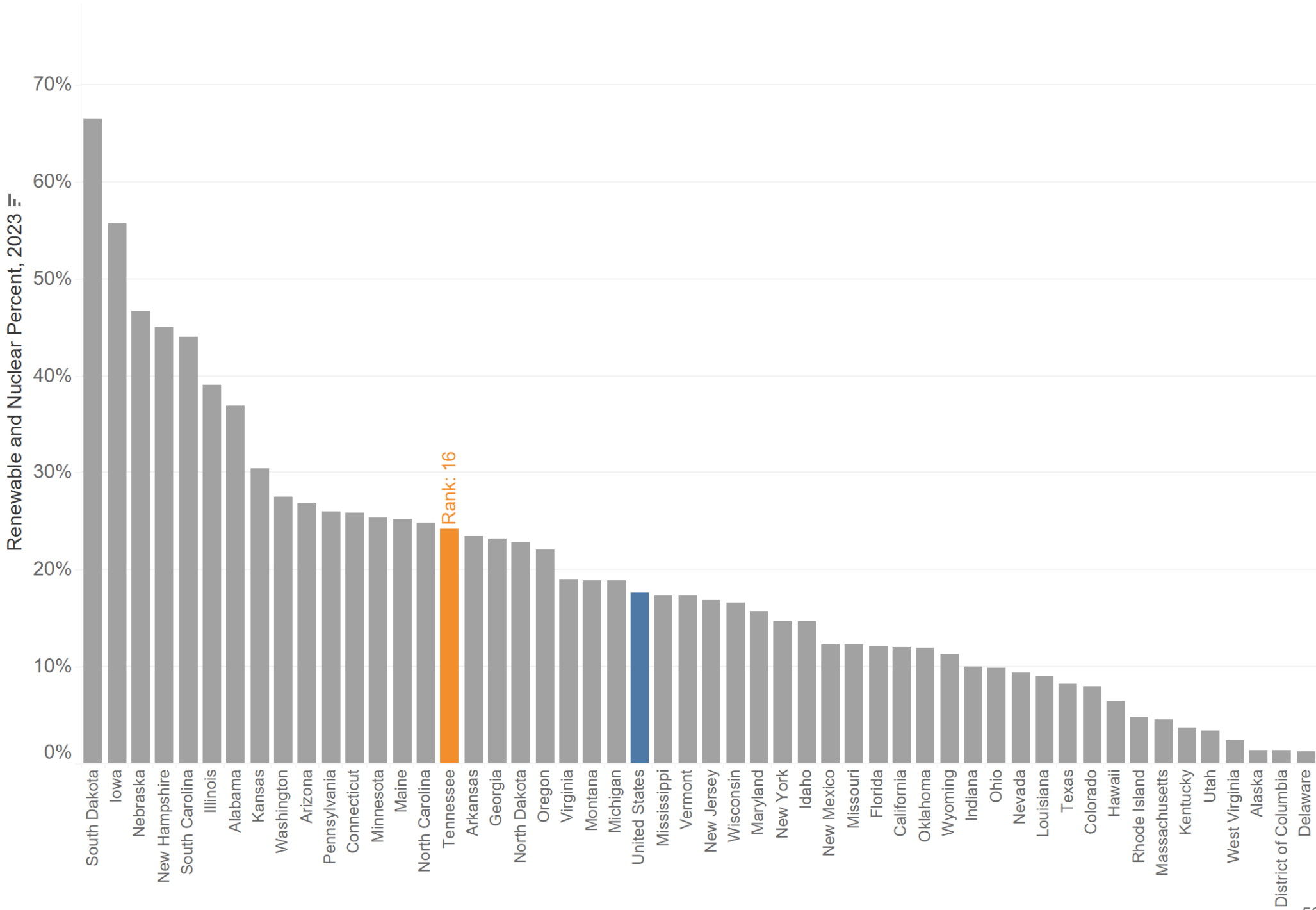
Source: US Cluster Mapping Project; Census ACS5

Home Ownership Rate, 2024



Source: US Cluster Mapping Project; Census ACS5

Renewable and Nuclear Energy Production as a Percent of Consumption, 2023



Source: US Cluster Mapping Project; EIA SEDS

**Strategy and 
Competitiveness
Associates**

Boston, MA
info@strat-comp.org