

Tennessee Leaders Action Platform



global action
platform
food+health+prosperity

Zone 5: Nashville

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.

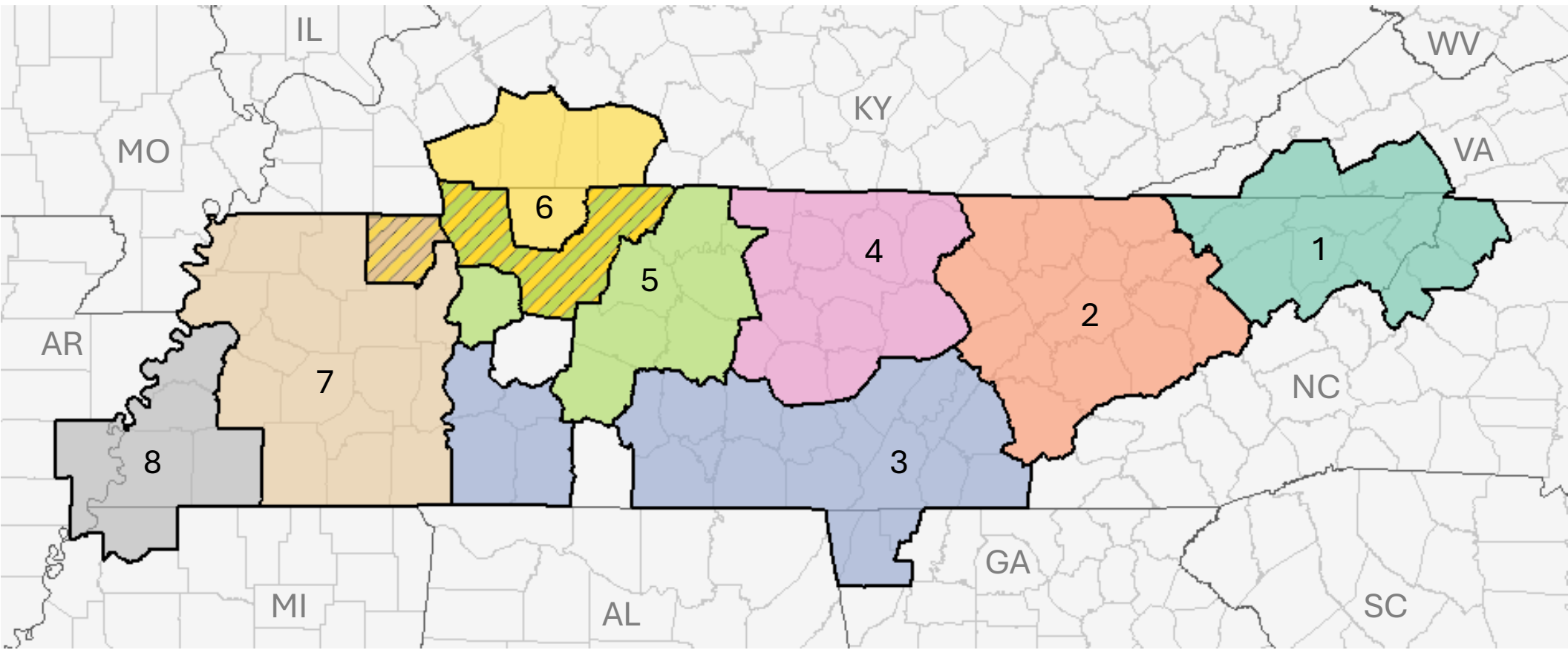
Introduction

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.

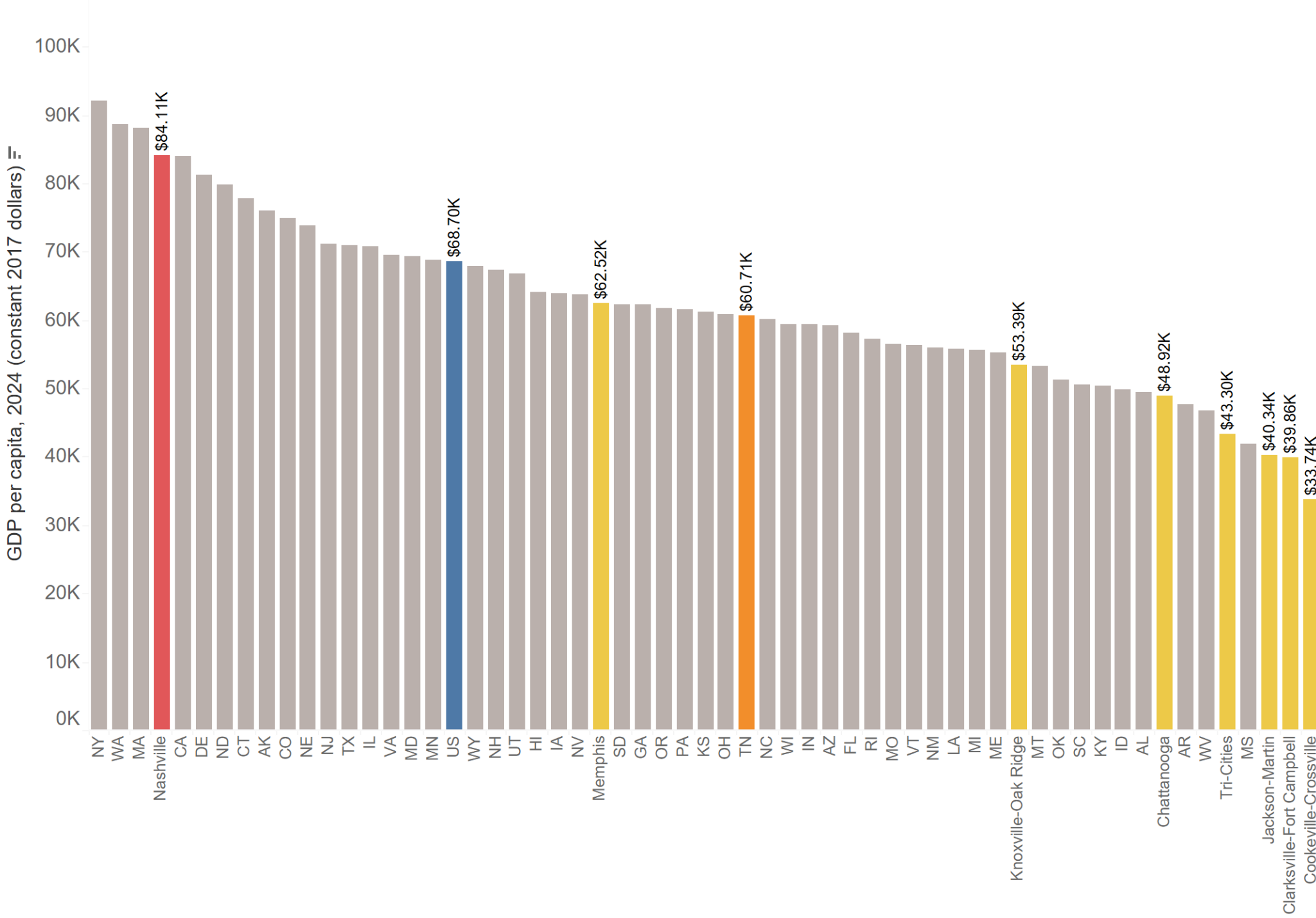
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Economic Outcomes

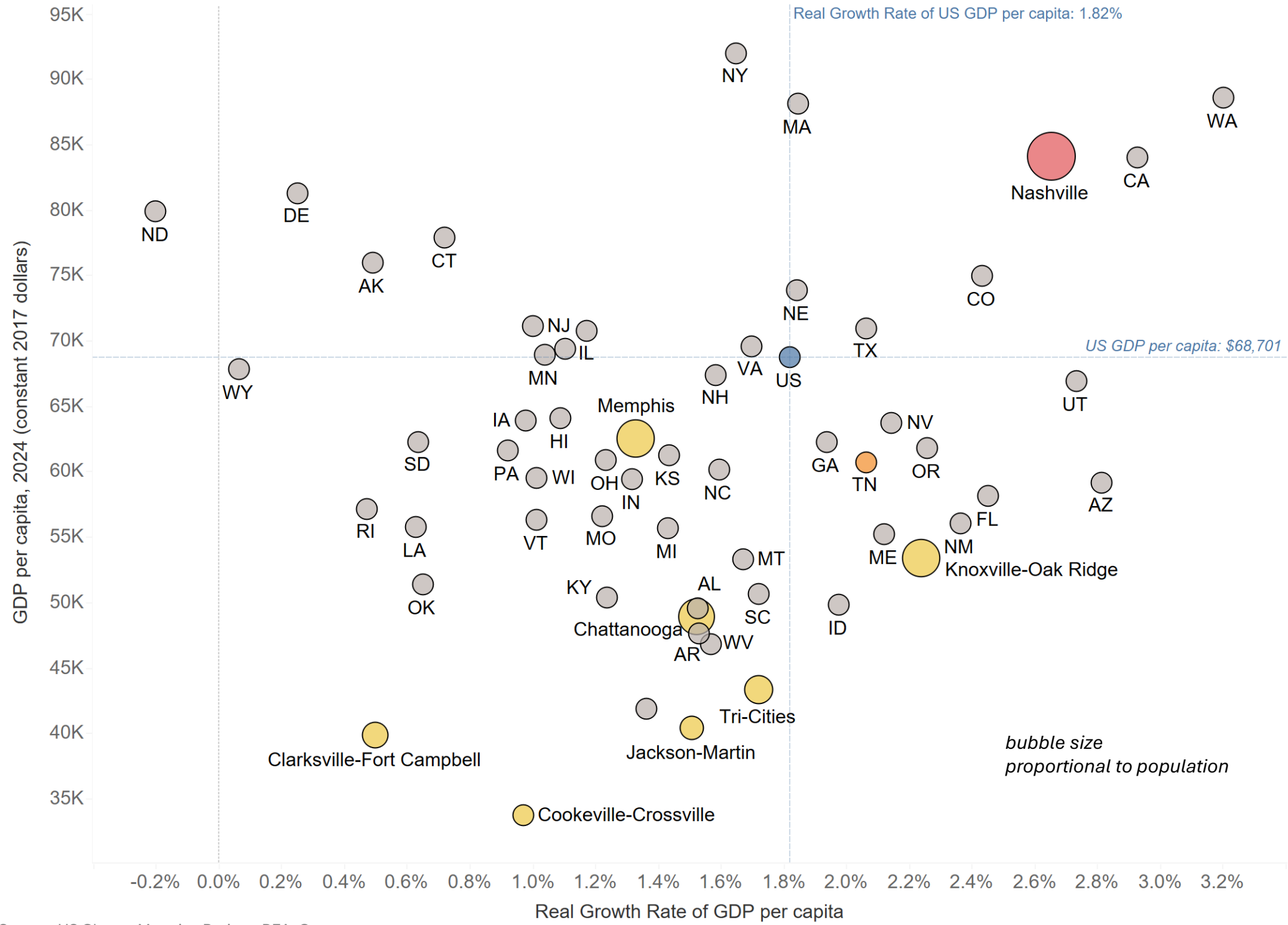
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GDP per capita, 2024



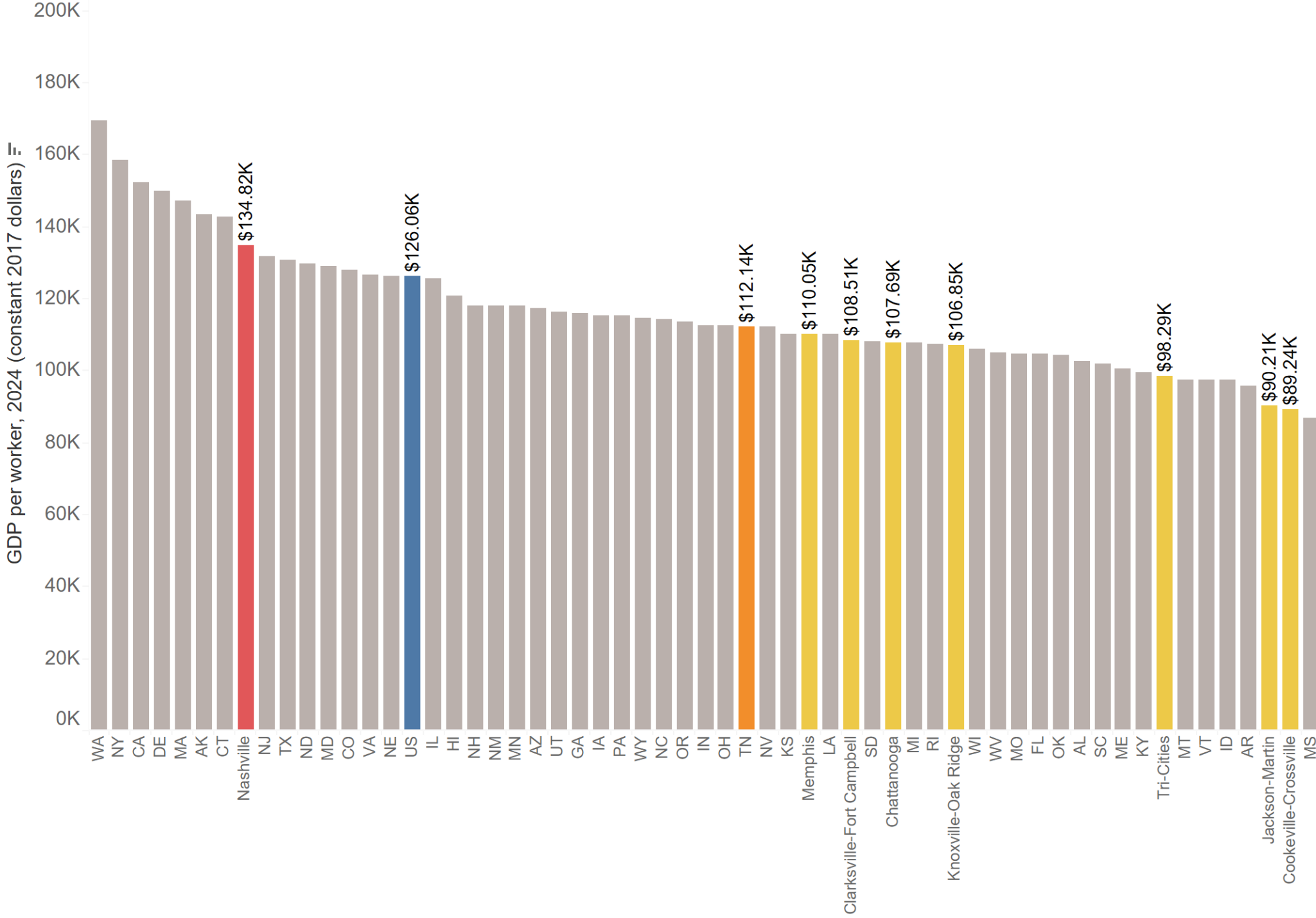
Source: US Cluster Mapping Project; BEA; Census

GDP Per Capita and Real Growth Rate, 2014-2024

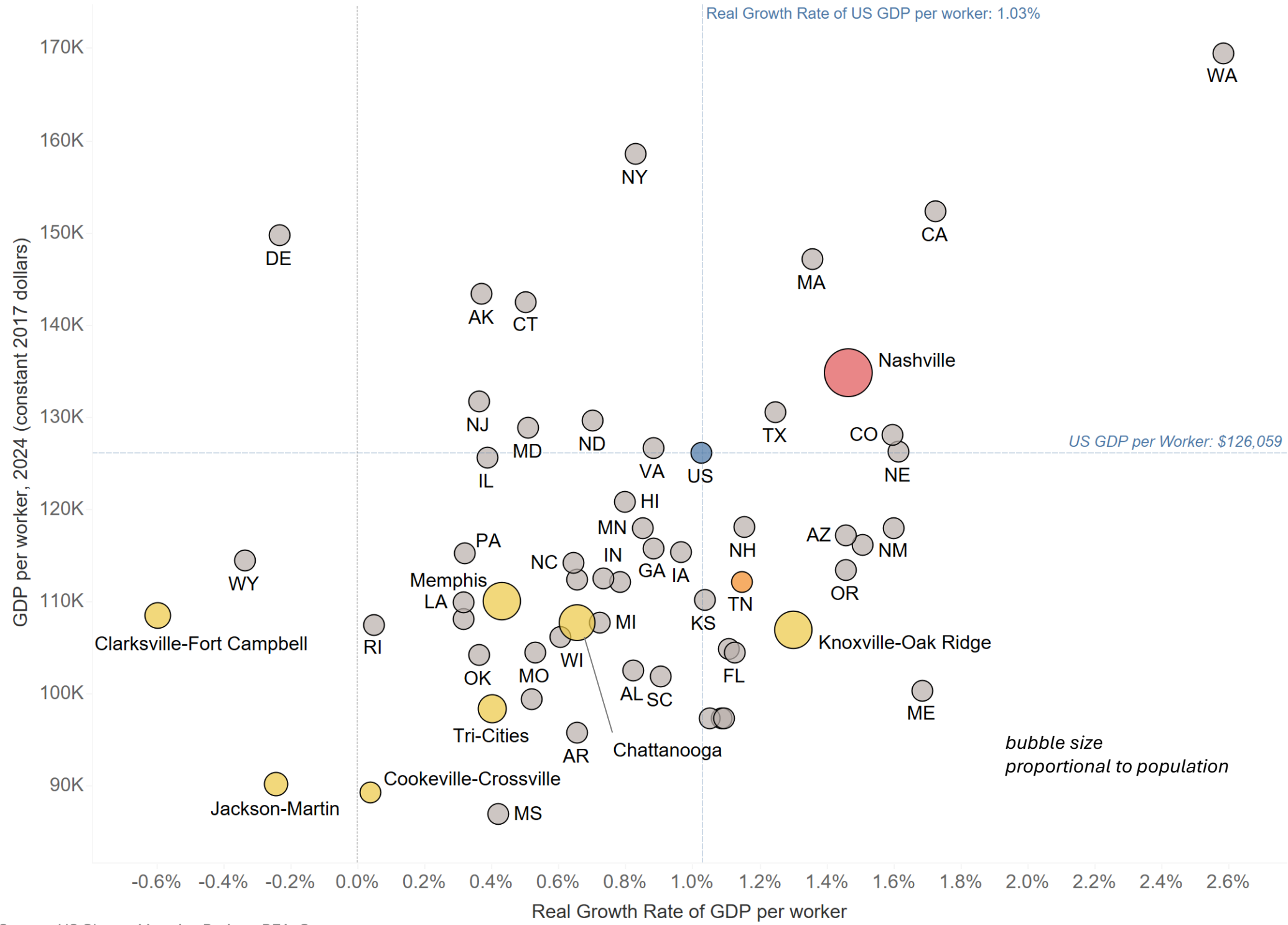


Source: US Cluster Mapping Project; BEA; Census

GDP per worker, 2024

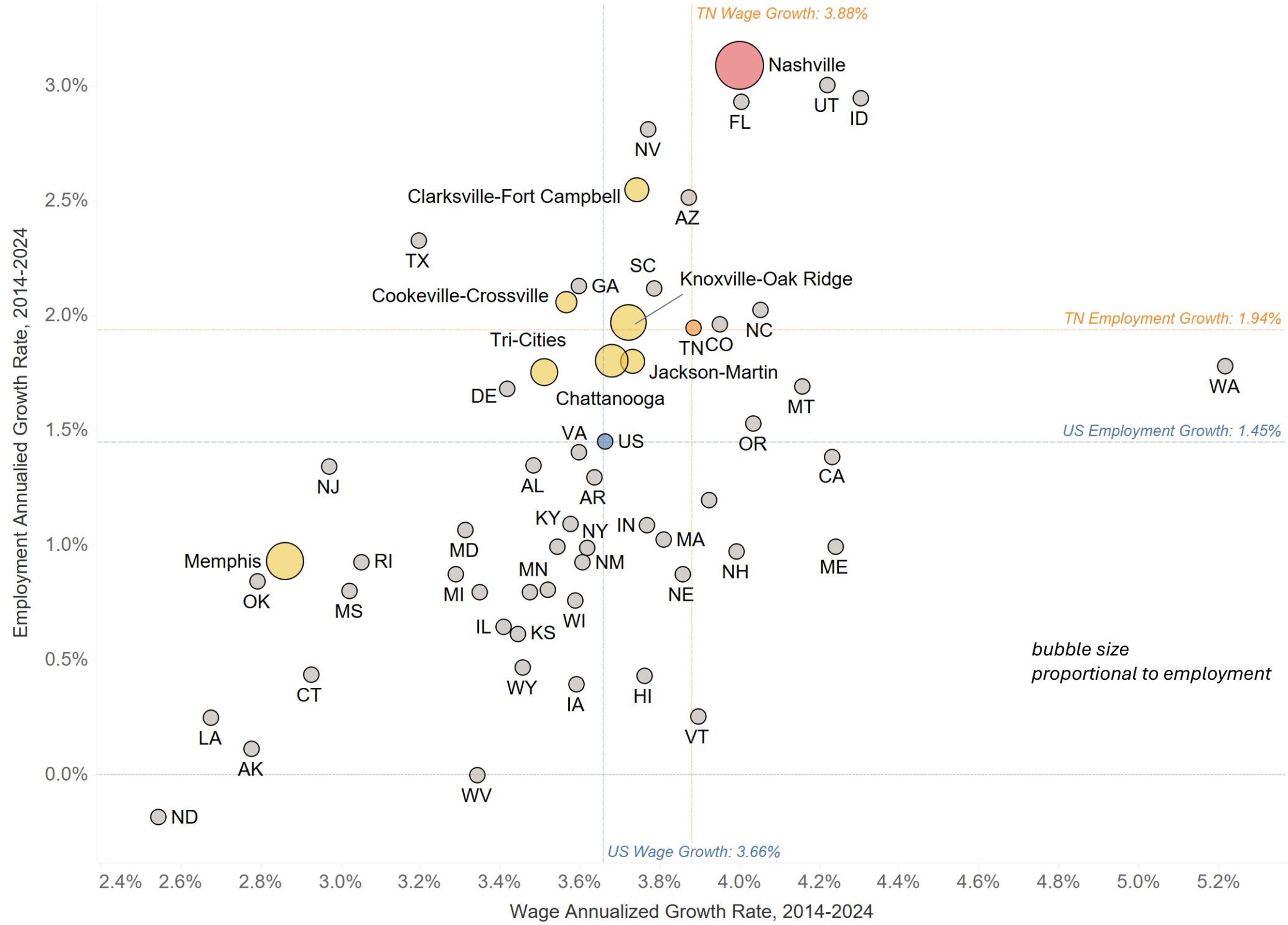


GDP Per Worker and Real Growth Rate, 2014-2024

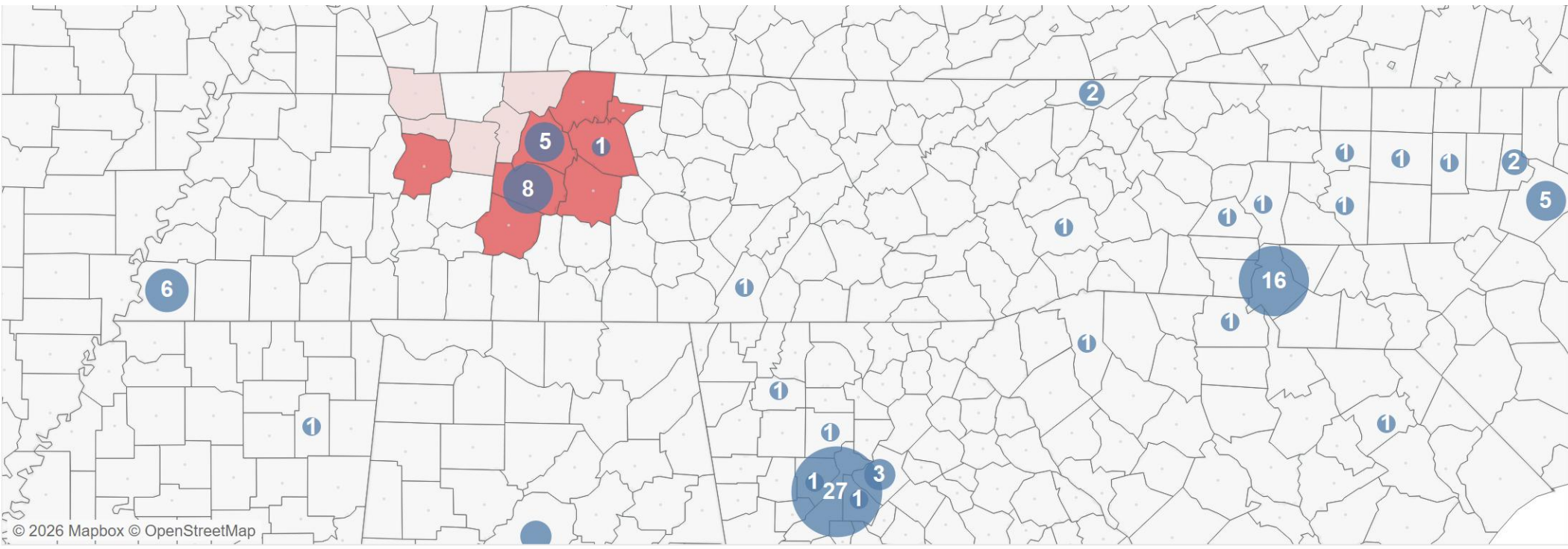


Source: US Cluster Mapping Project; BEA; Census

Employment Growth and Wage Growth, 2014-2024



Fortune 1000 Company Headquarters Locations



Zone 5: Nashville

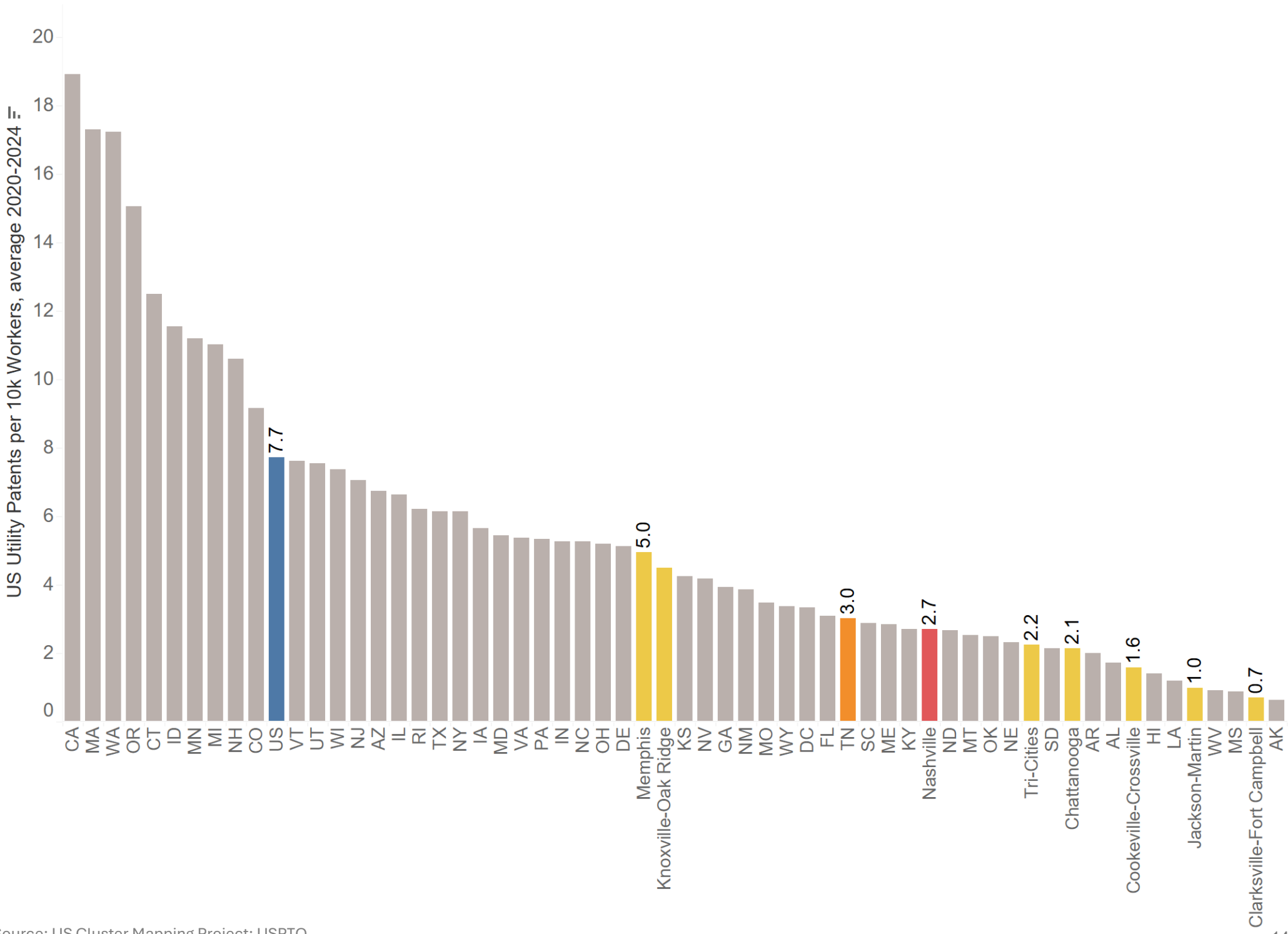
Number of HQs by county

Rank	Company	City	State	Industry	Market Value
61	HCA Healthcare	Nashville	Tennessee	Health Care: Medical Facilities	\$85.08B
112	Dollar General	Goodlettsville	Tennessee	Specialty Retailers: Other	\$19.34B
296	Tractor Supply	Brentwood	Tennessee	Specialty Retailers: Other	\$29.29B
302	LKQ	Antioch	Tennessee	Wholesalers: Diversified	\$11B
335	Community Health Systems	Franklin	Tennessee	Health Care: Medical Facilities	\$379.1M
336	Delek US Holdings	Brentwood	Tennessee	Petroleum Refining	\$932.3M
579	Ardent Health Partners	Brentwood	Tennessee	Health Care: Medical Facilities	\$1.96B
852	Cracker Barrel Old Country Sto..	Lebanon	Tennessee	Food Services	\$864.3M
893	Acadia Healthcare	Franklin	Tennessee	Health Care: Medical Facilities	\$2.82B
895	Brookdale Senior Living	Brentwood	Tennessee	Health Care: Medical Facilities	\$1.25B
899	Surgery Partners	Brentwood	Tennessee	Health Care: Medical Facilities	\$3.03B
902	Pinnacle Financial Partners	Nashville	Tennessee	Commercial Banks	\$8.2B
909	Kaiser Aluminum	Franklin	Tennessee	Metals	\$976M
930	Louisiana-Pacific	Nashville	Tennessee	Building Materials, Glass	\$6.41B

Innovation Inputs

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Share of Employment Created through FDI*	page 19
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Patenting Intensity, 2020-2024



Source: US Cluster Mapping Project; USPTO

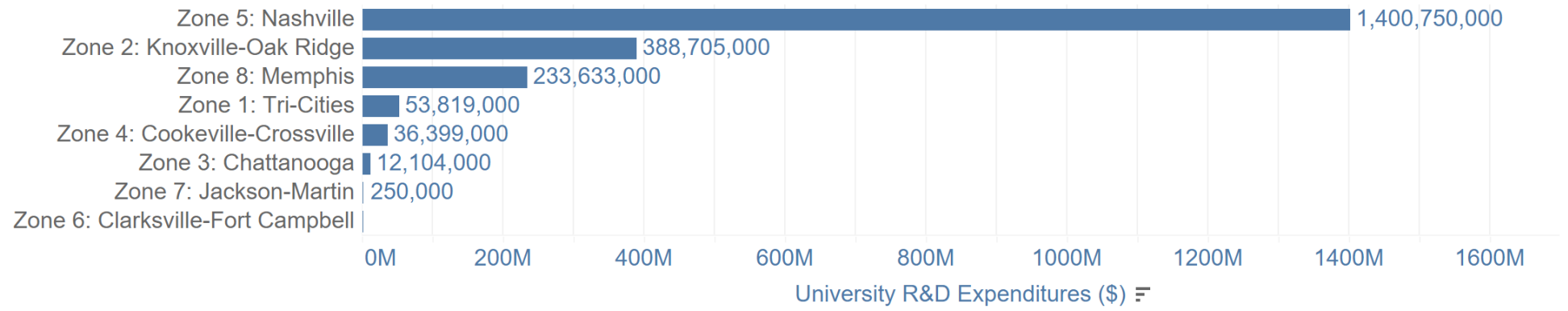
Utility Patents by Organization, 2020-2024

Zone 5: Nashville

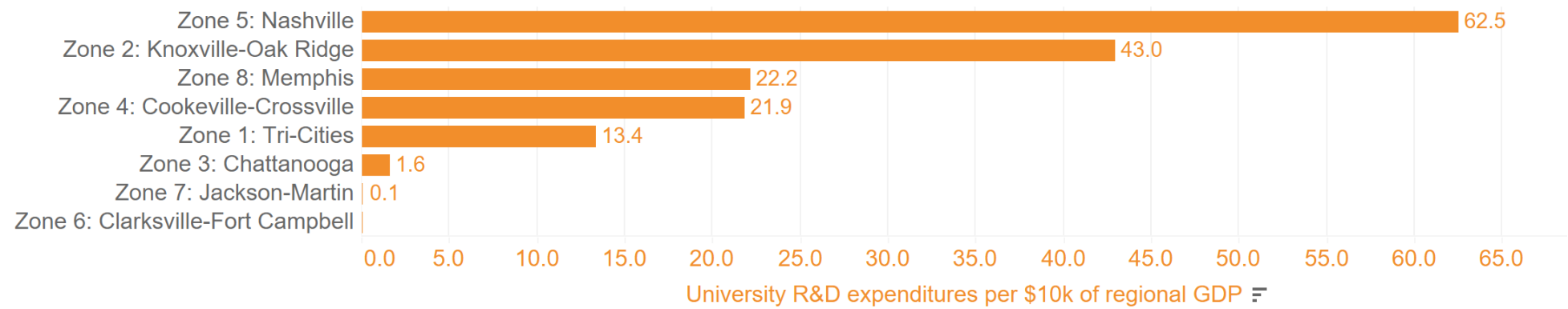
VANDERBILT UNIVERSITY	251
SDC U.S. SMILEPAY SPV	48
SCHNEIDER ELECTRIC USA, INC.	42
ELECTROLUX HOME PRODUCTS, INC.	40
BRIDGESTONE AMERICAS TIRE OPERATIONS, LLC	39
C/HCA, INC.	31
SYNERGY BLUE, LLC	28
DEPUY SYNTHES PRODUCTS, INC.	25
MDSAVE SHARED SERVICES INC.	24
HUNTER FAN COMPANY	21
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ULTRA SMALL FIBERS, LLC	15
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LOUISIANA-PACIFIC CORP.	11
PADDYWAX, LLC	11
I-LUMEN SCIENTIFIC, INC.	9
NASHVILLE WIRE PRODUCTS MANUFACTURING COMPANY, LLC	9

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

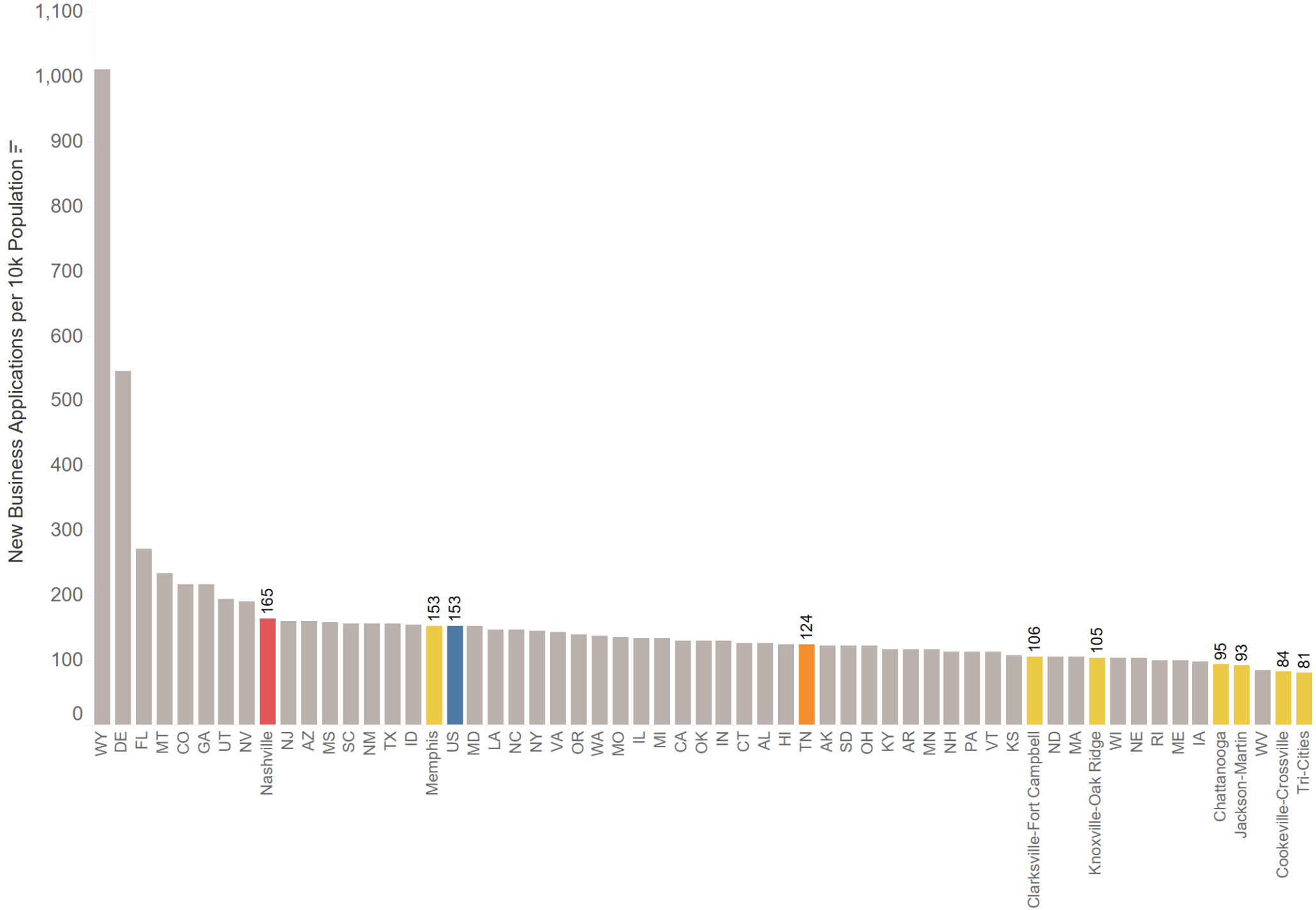


R&D Expenditure by University, 2024

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

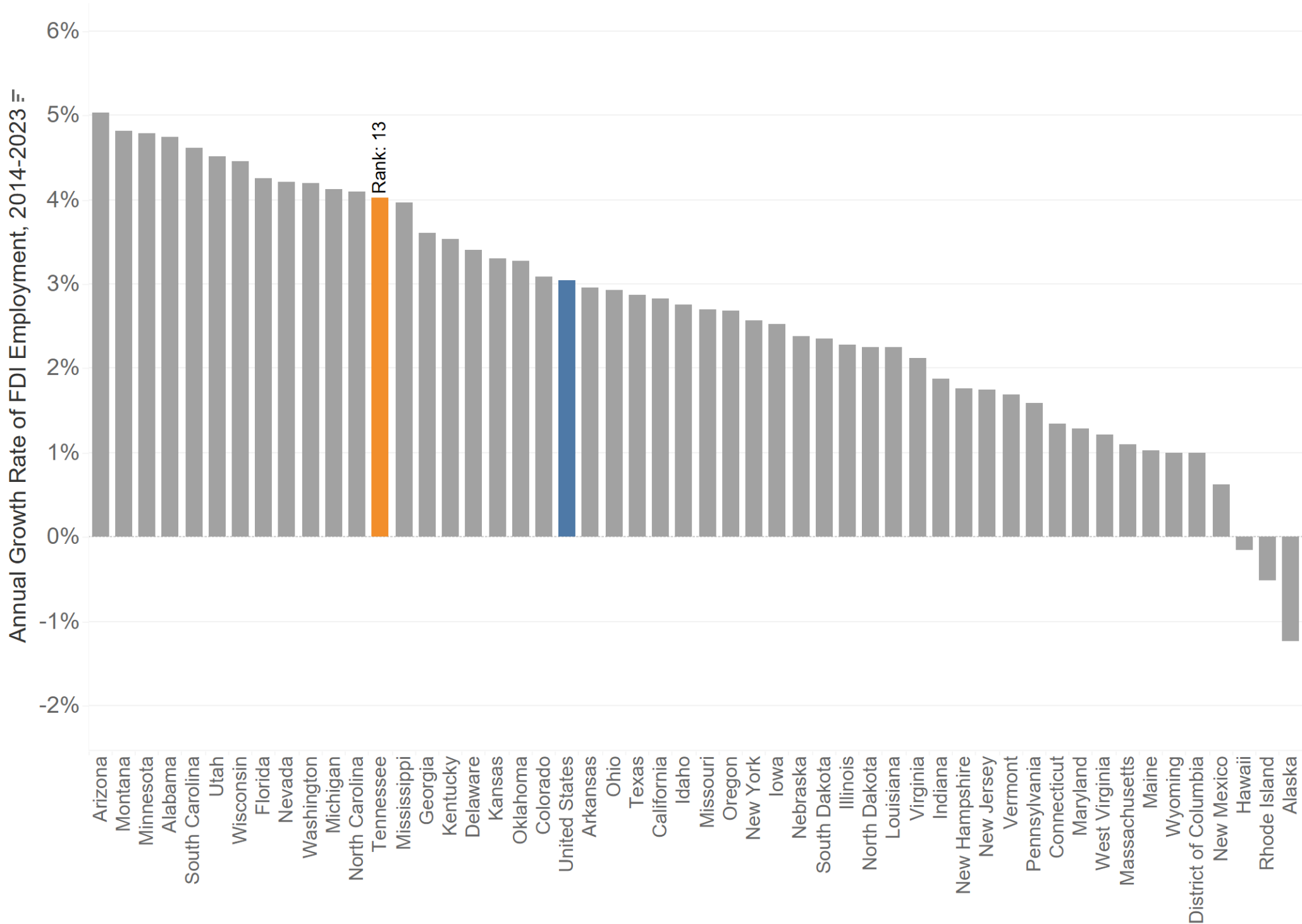
Source: US Cluster Mapping Project; NSF NCSES

New Business Formation, 2024



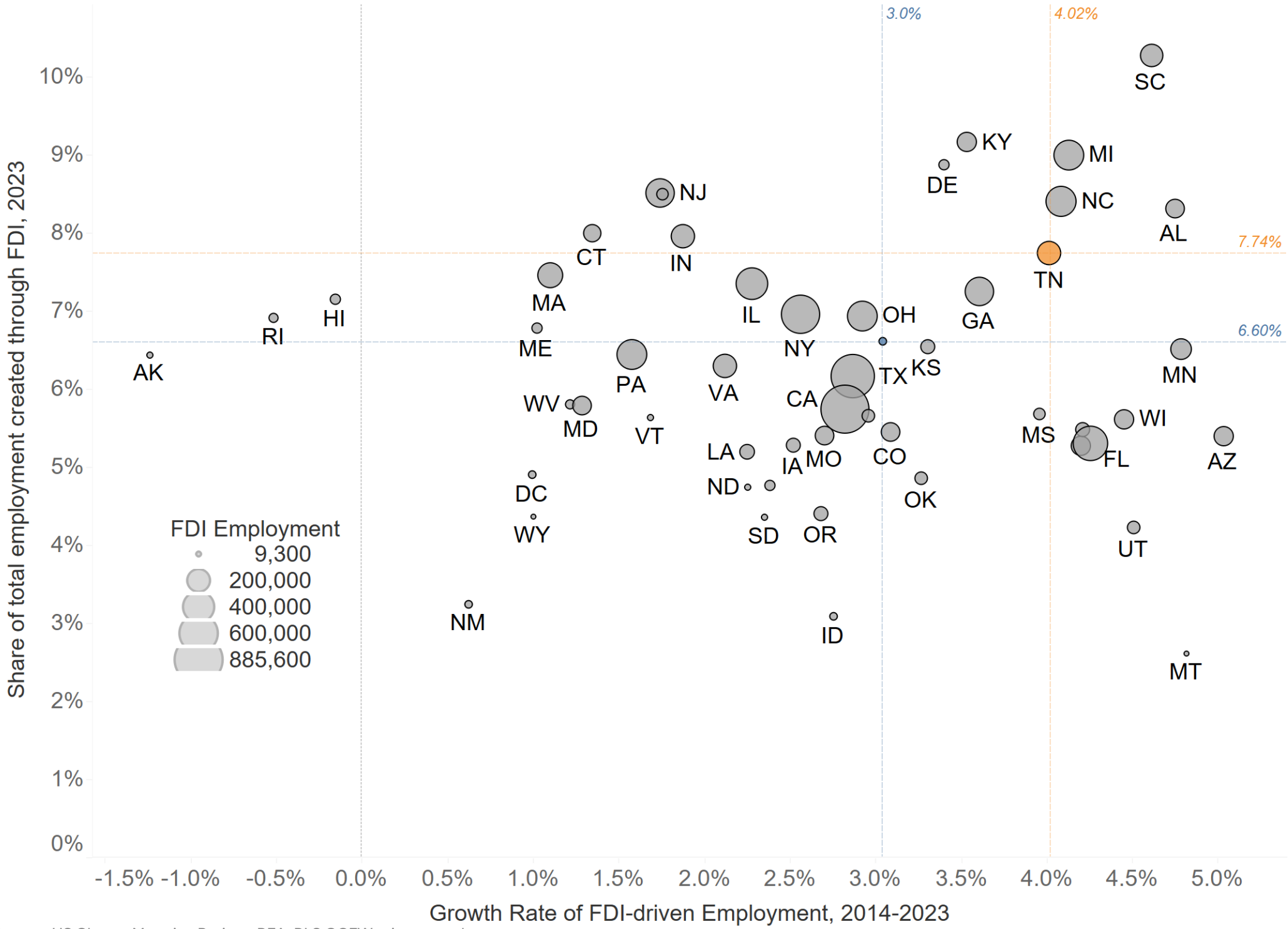
Source: US Cluster Mapping Project; BEA; Census

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

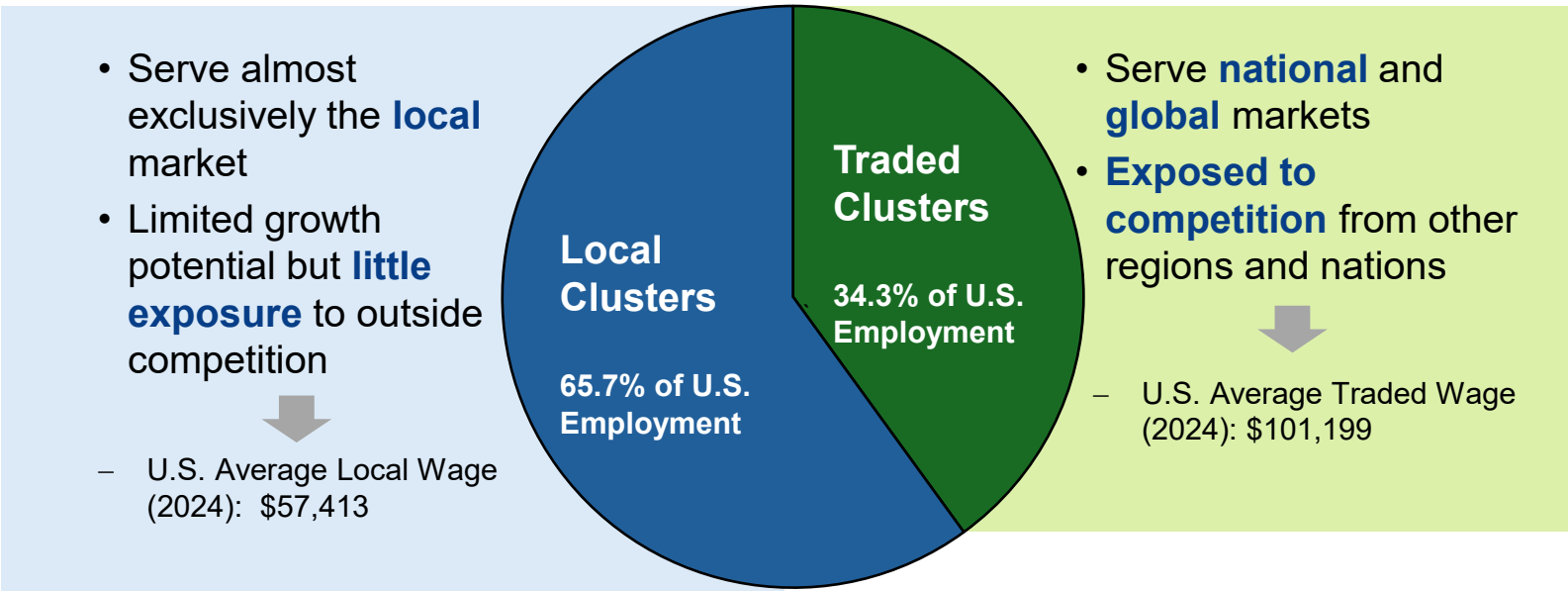


Source: US Cluster Mapping Project; BEA; USATrade. Nominal values.

Cluster Composition

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Tri-Cities: Traded versus Local Clusters

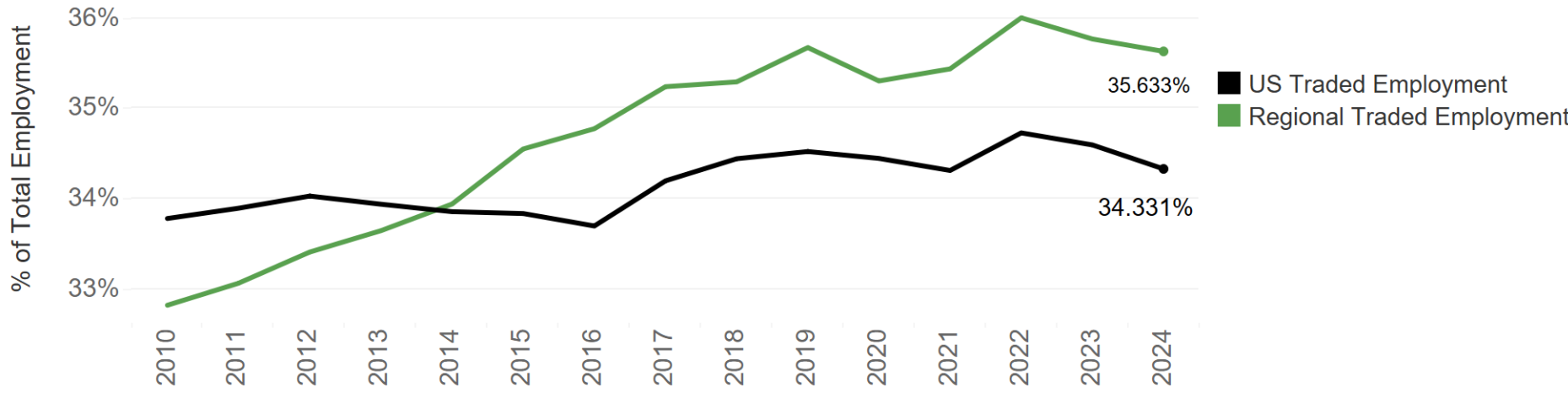


Traded Employment Share, 2024

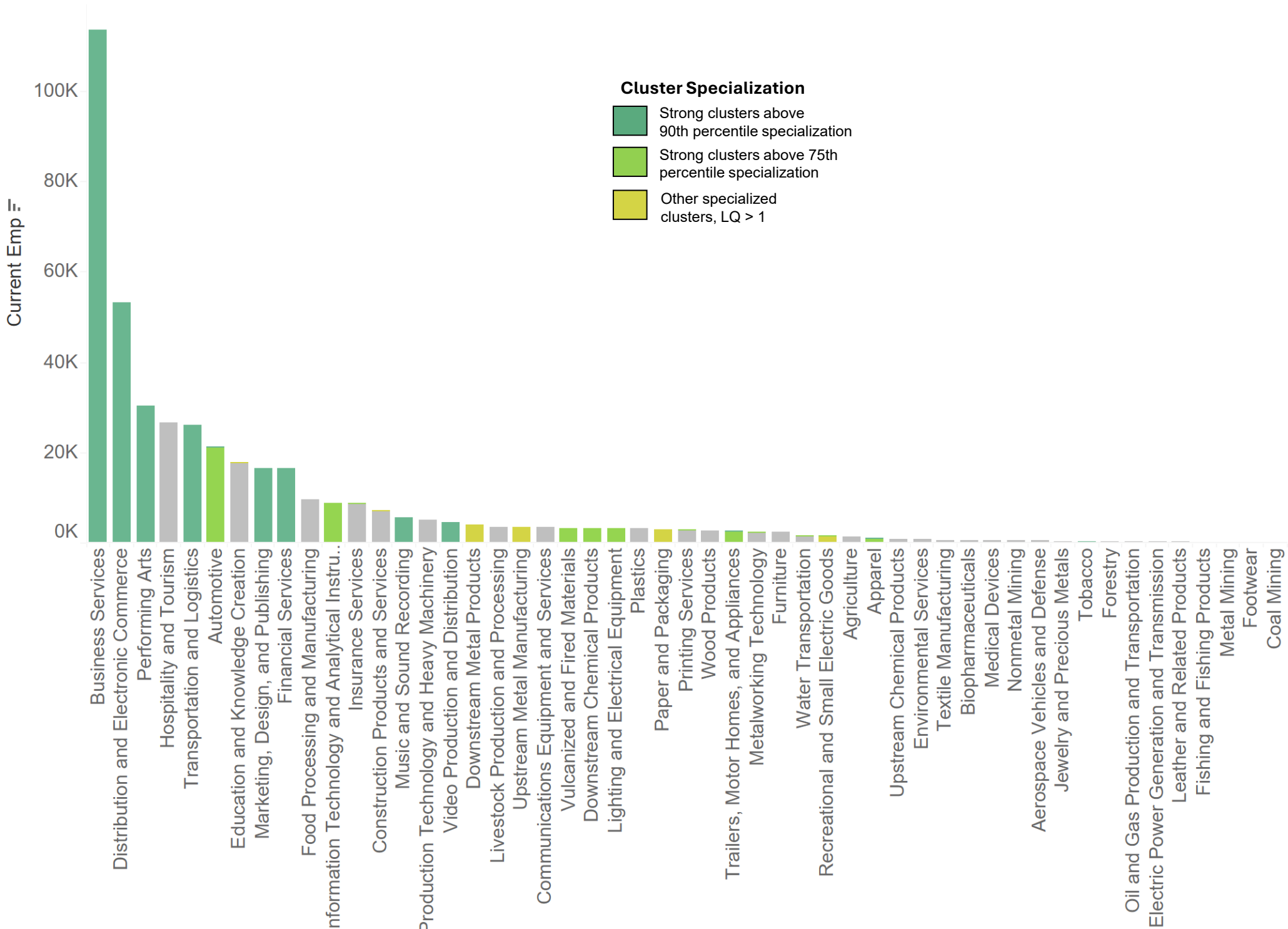
	Local	Traded
Regional Employment	64.4%	35.6%
US Employment	65.7%	34.3%

Nashville Relative Wages, 2024

	Local	Traded	Total
Regional Wage	63,498	100,316	74,963
US Wage	57,413	101,199	72,465
Percent of US	110.6%	99.1%	103.4%

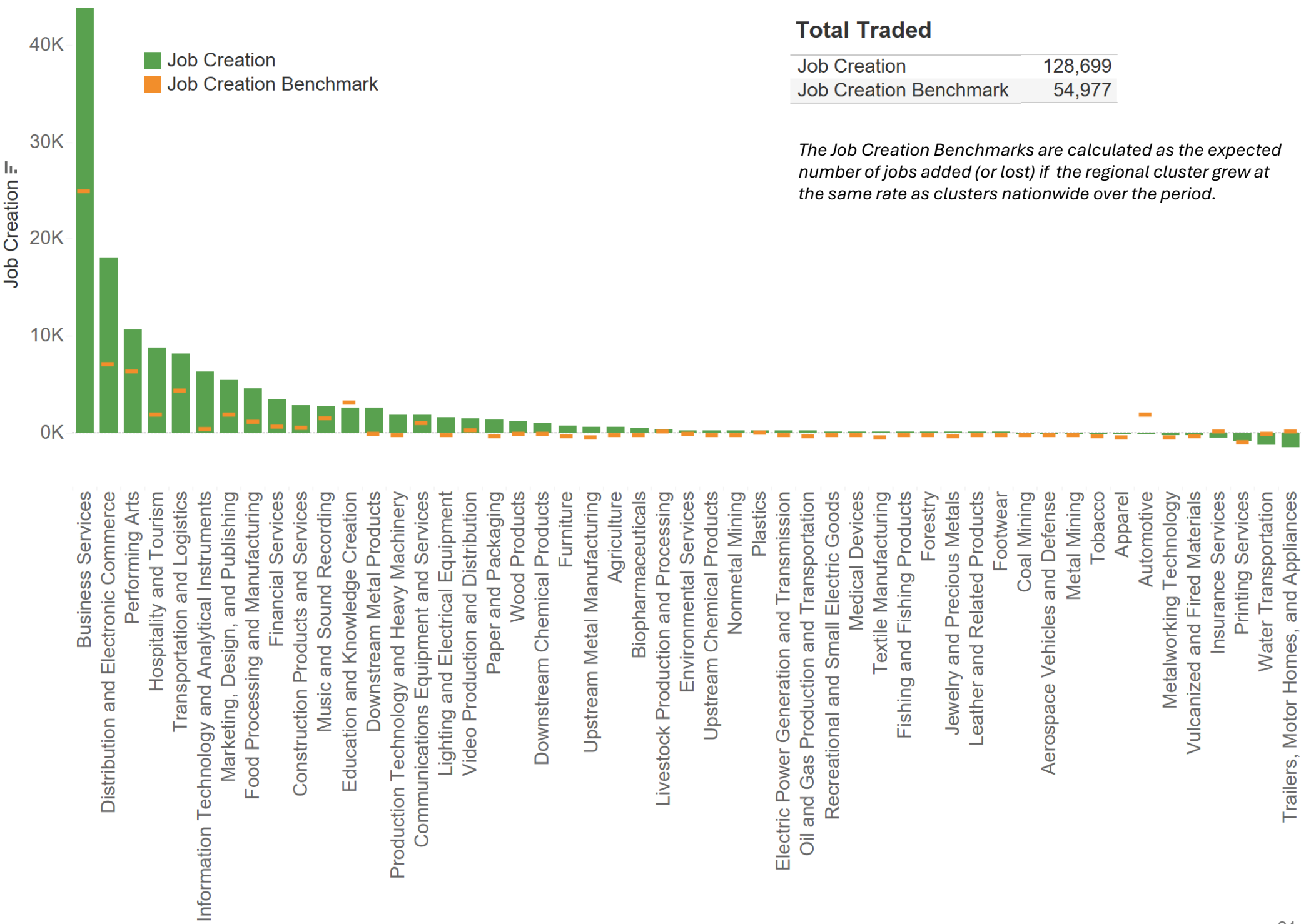


Nashville - Employment in Traded Clusters, 2024



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

Nashville - Job Creation in Traded Clusters, 2014-2024

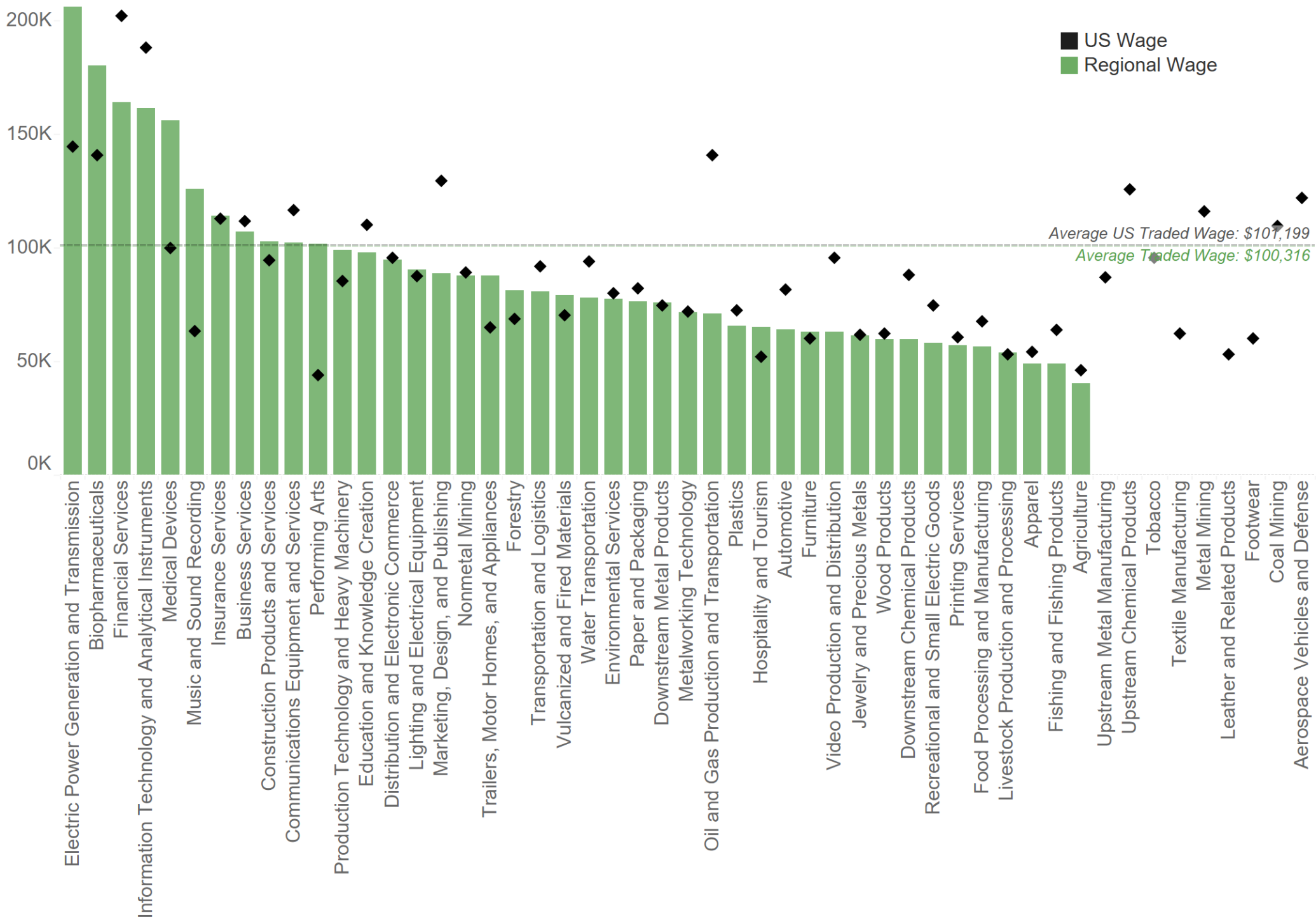


Total Traded

Job Creation	128,699
Job Creation Benchmark	54,977

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.

Nashville - Wages in Traded Clusters, 2024

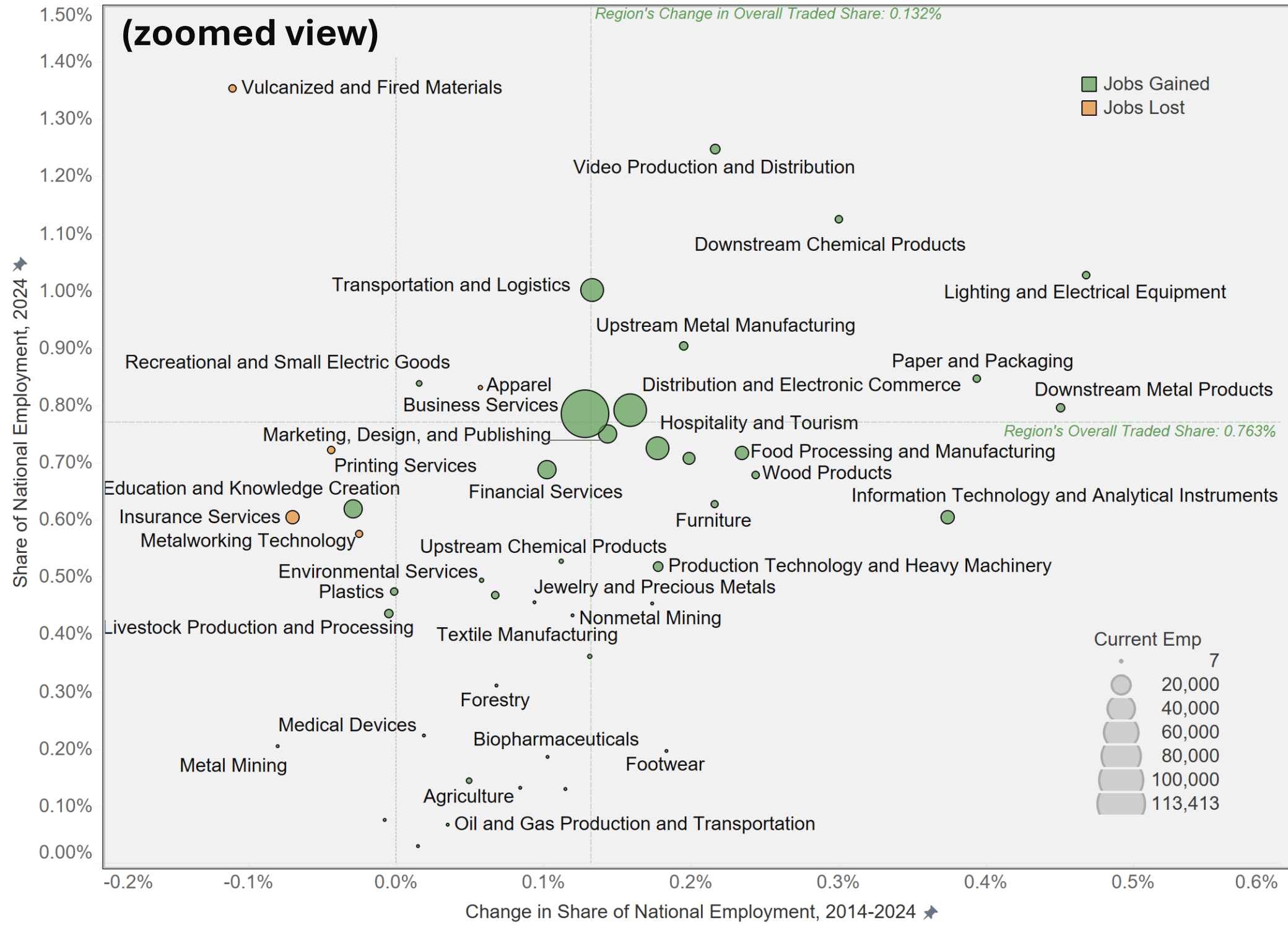


Source: US Cluster Mapping Project; BLS QCEW; Census NES – private employment

Zone 5: Nashville - Specialization in Traded Clusters, 2014-2024



Zone 5: Nashville - Specialization in Traded Clusters, 2014-2024

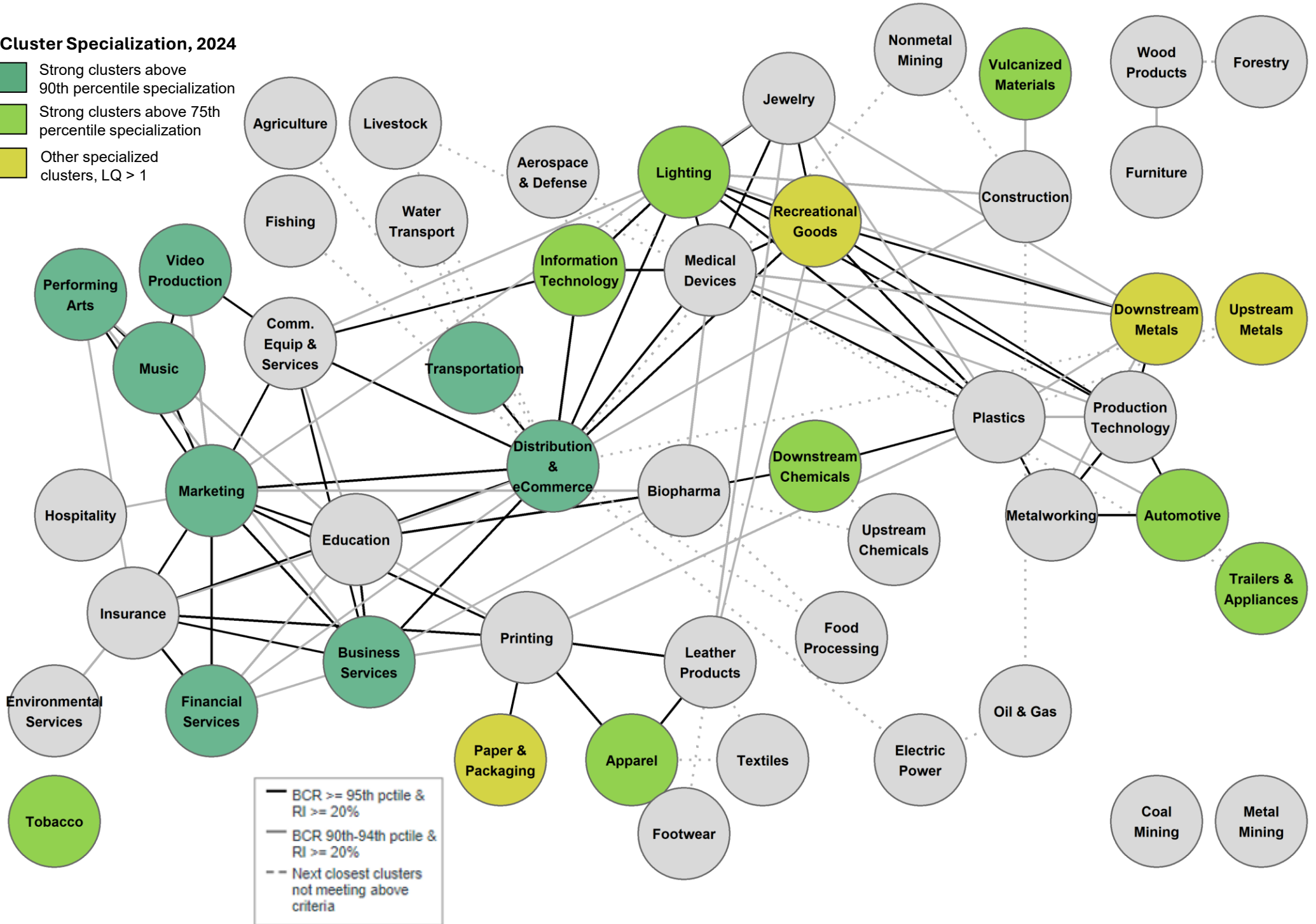


Source: US Cluster Mapping Project; BLS QCEW; Census NES – private employment

Nashville Cluster Linkages and Economic Diversification

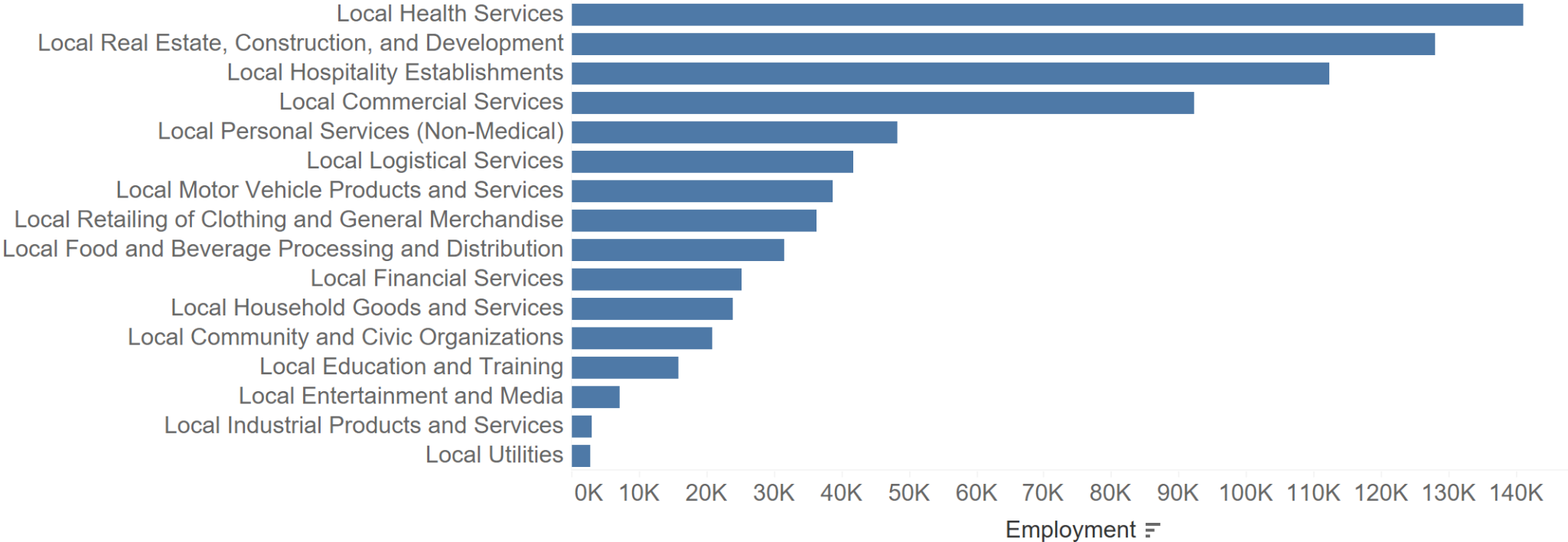
Cluster Specialization, 2024

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

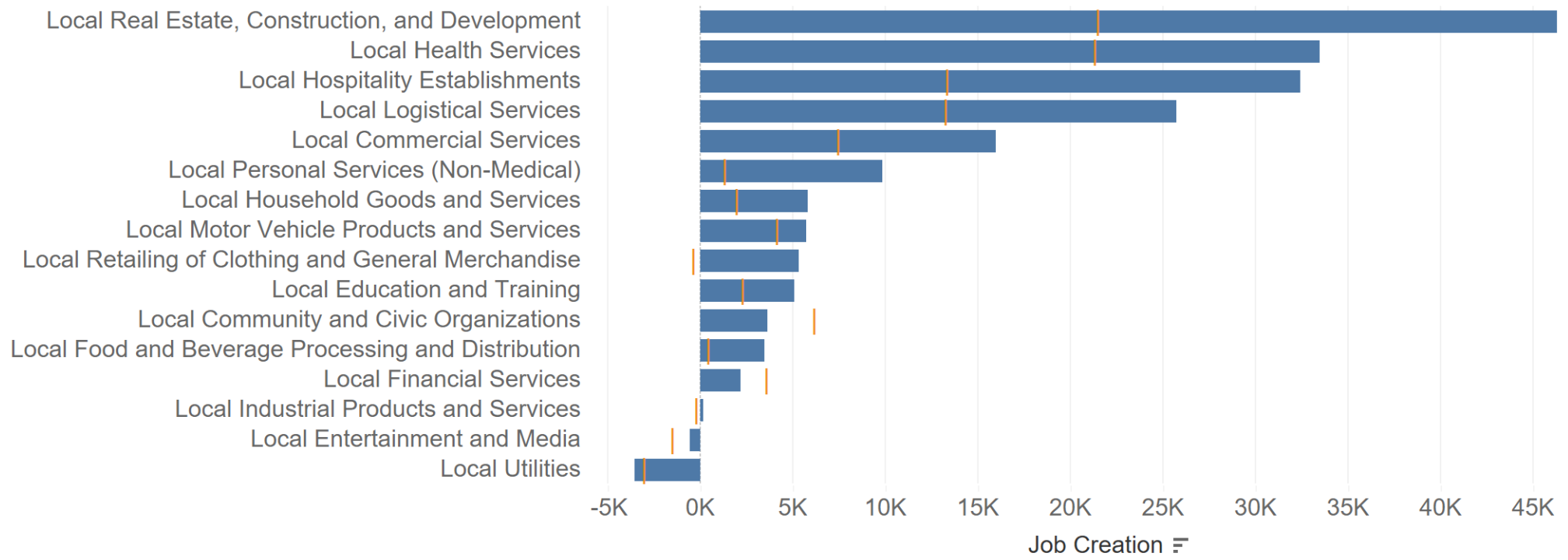


— BCR >= 95th pctile & RI >= 20%
 — BCR 90th-94th pctile & RI >= 20%
 - - Next closest clusters not meeting above criteria

Nashville - Employment in Local Clusters, 2024



Nashville - Job Creation in Local Cluster, 2014-2024



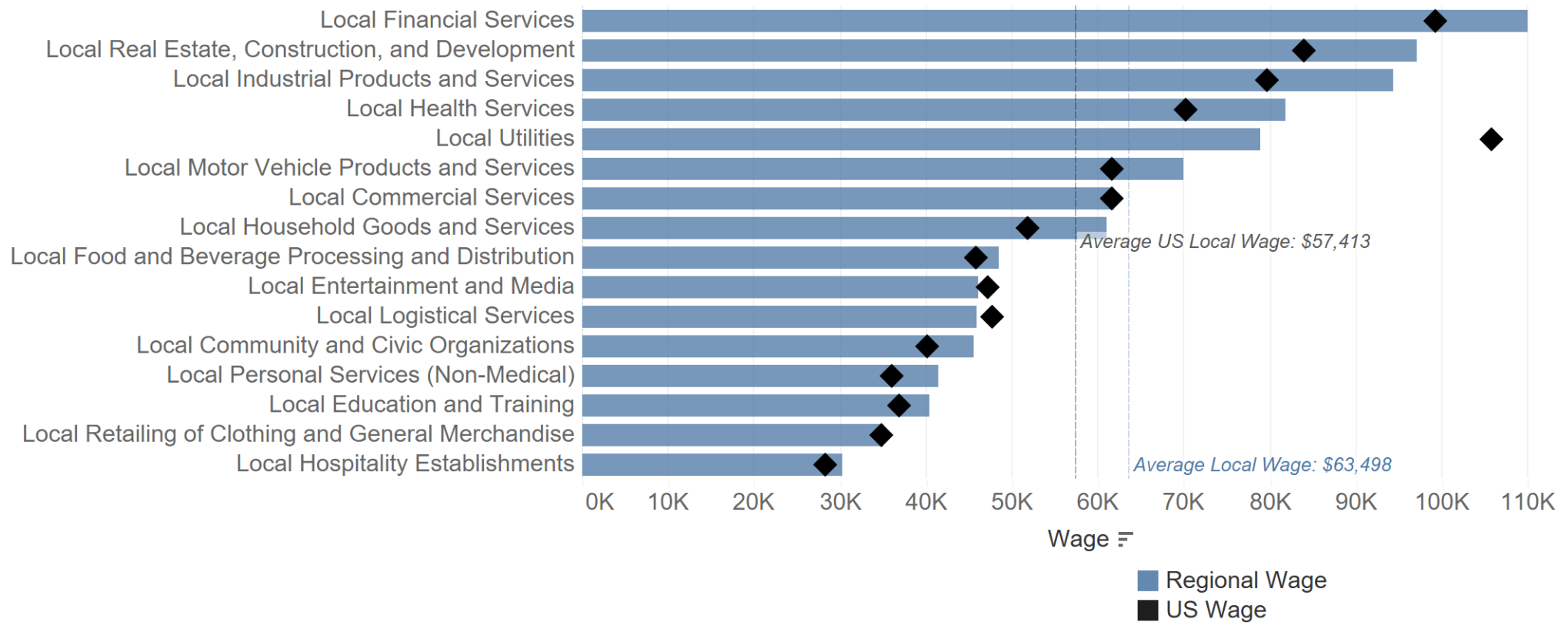
Total Local

Job Creation	190,879
Job Creation Benchmark	92,685

■ Job Creation
■ Job Creation Benchmark

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.

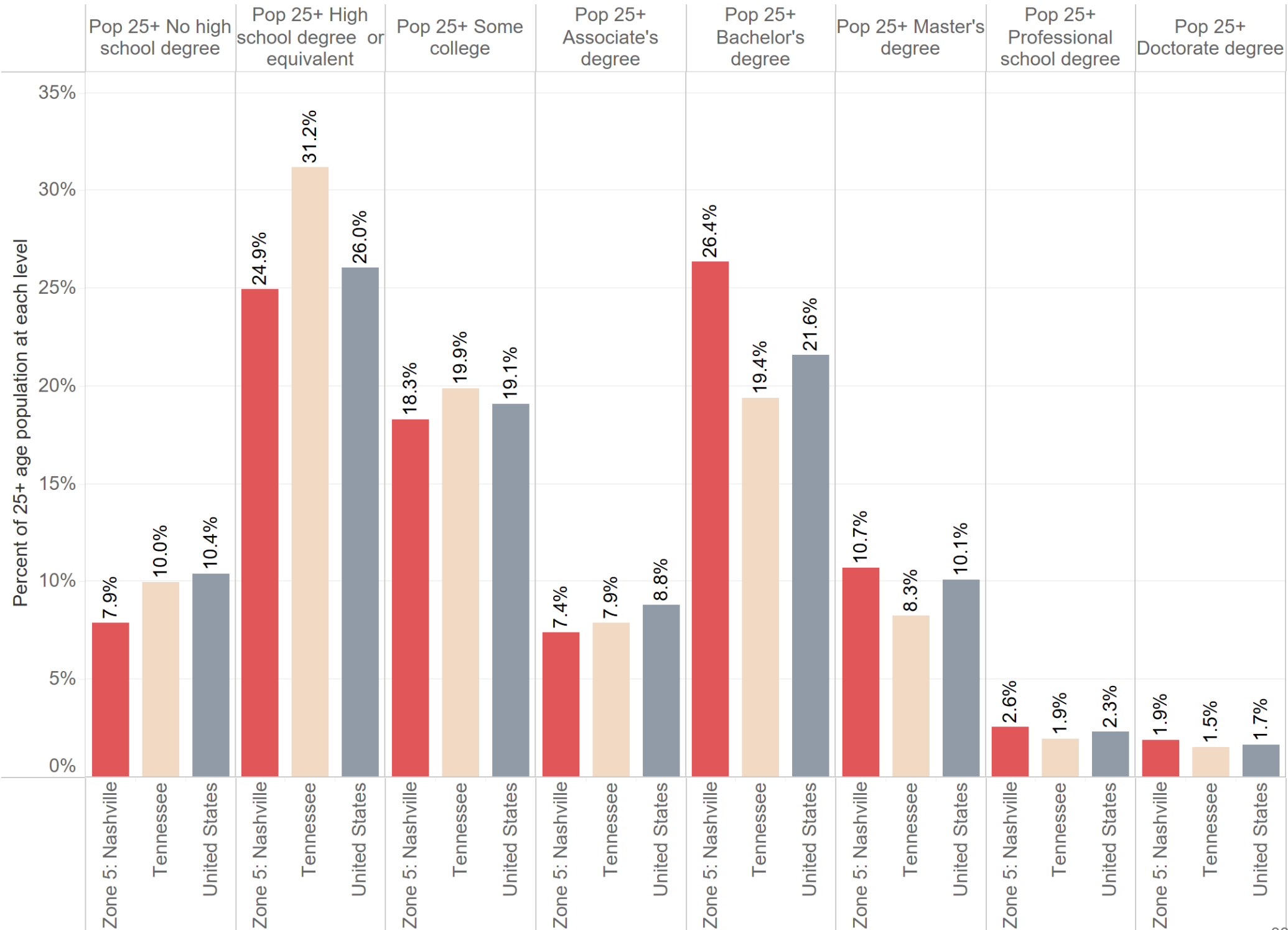
Nashville - Wages in Traded Clusters, 2024



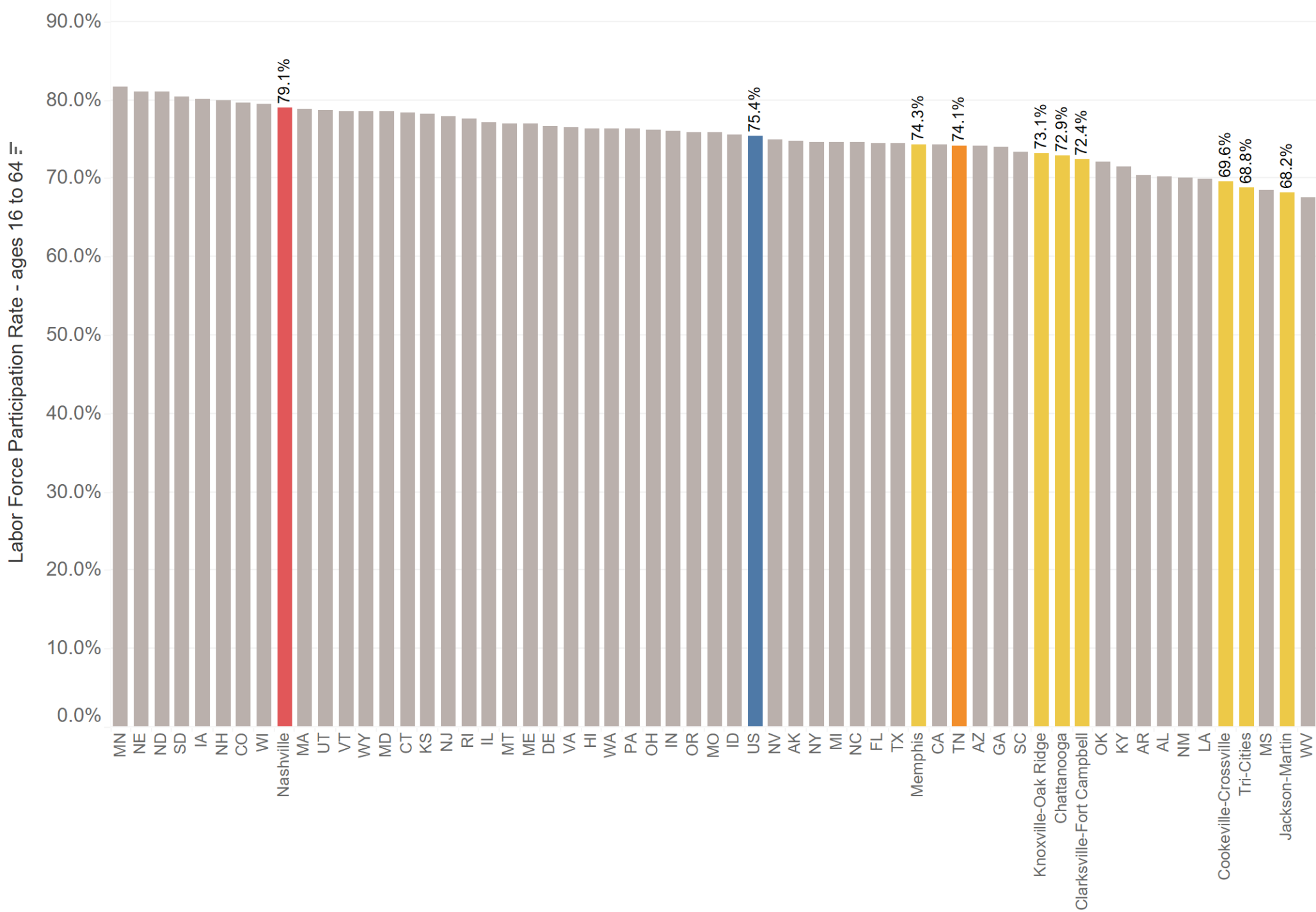
Education and Workforce

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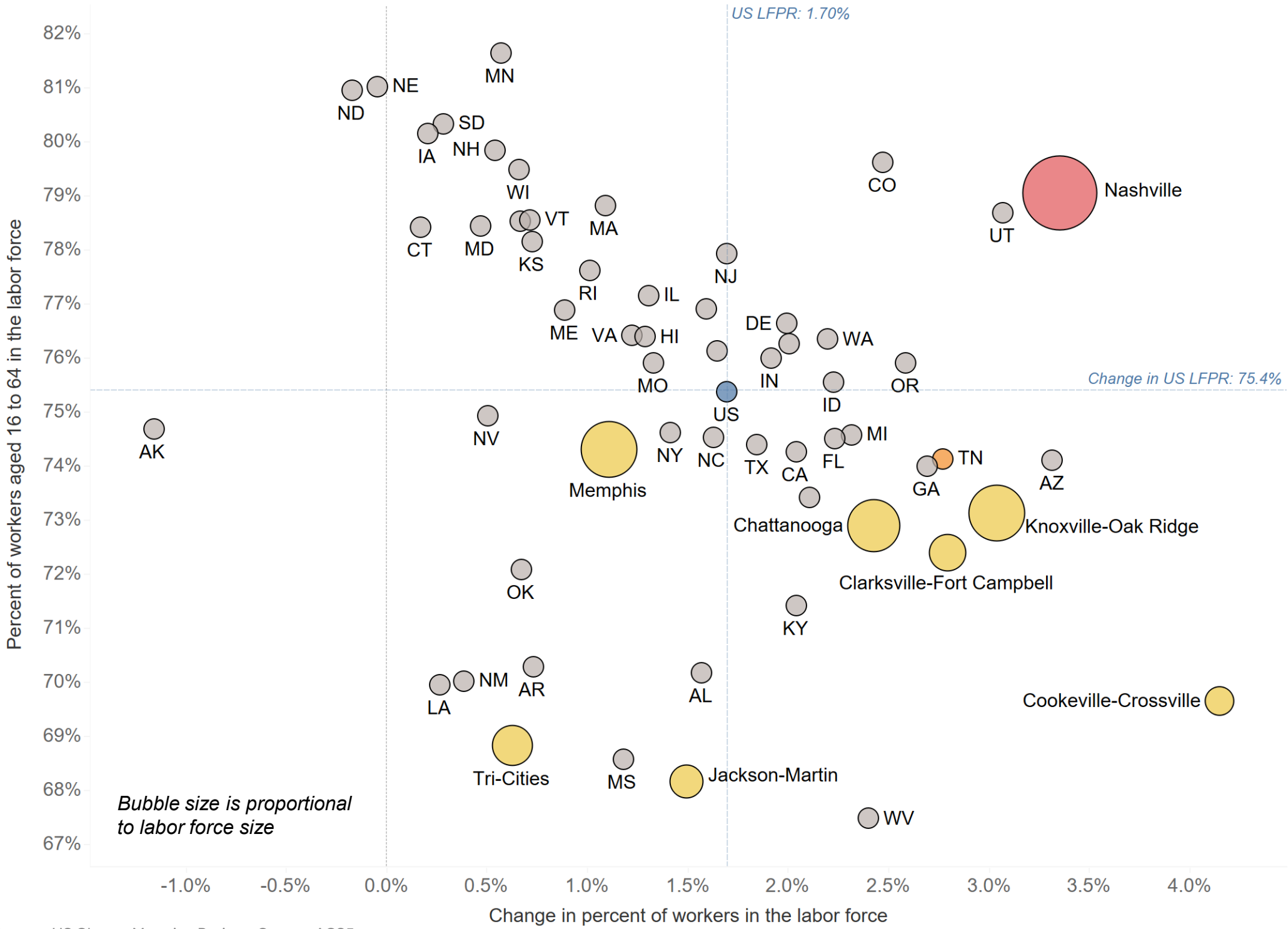
Educational Attainment, 2024



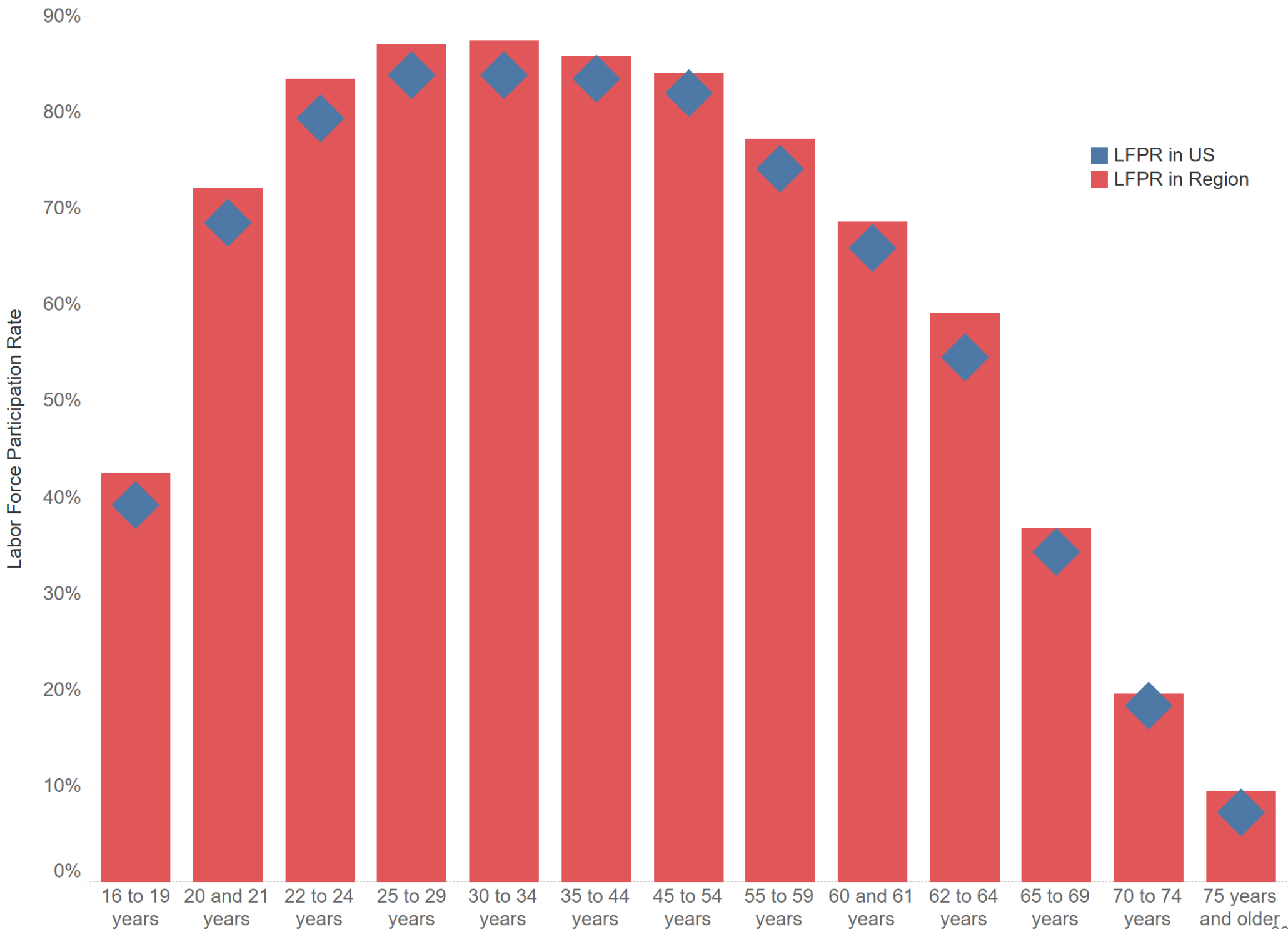
Labor Force Participation Rate - ages 16 to 64, 2024



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

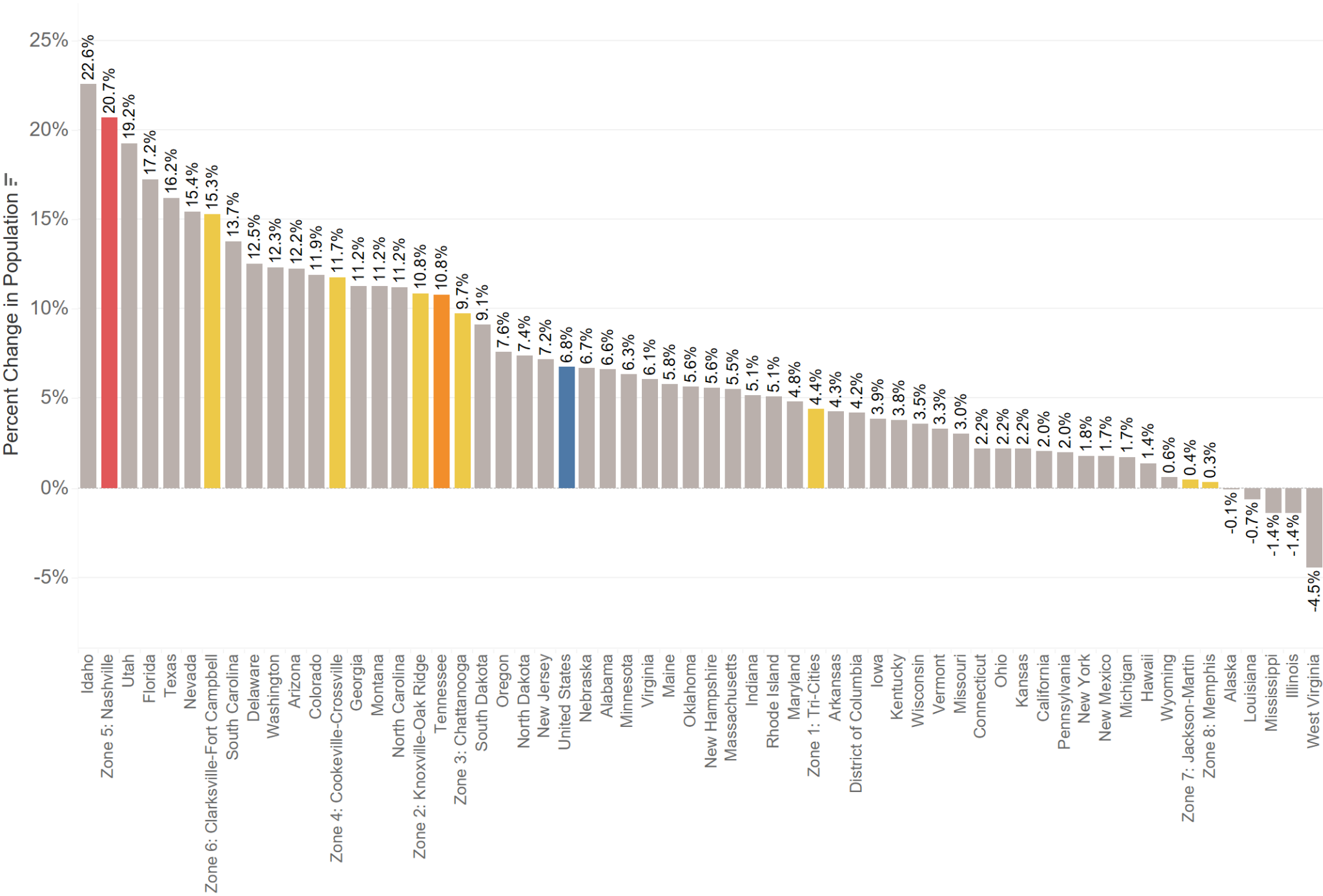


Nashville: Labor Force Participation Rate by Age, 2024



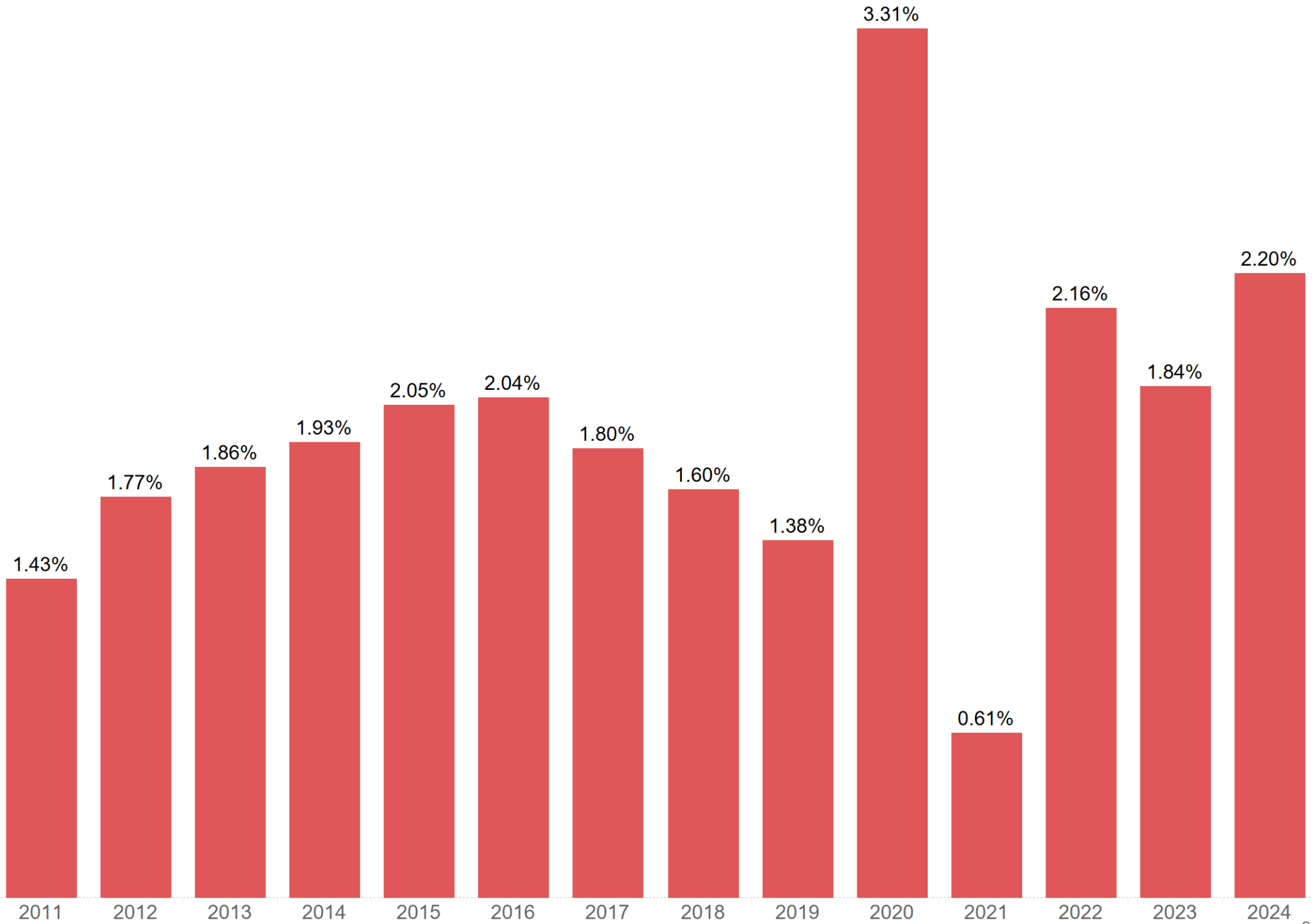
Source: US Cluster Mapping Project; Census ACS5

Population Percent Change, 2014-2024



Source: US Cluster Mapping Project; Census ACS5

Zone 5: Nashville - Change in Population by Year

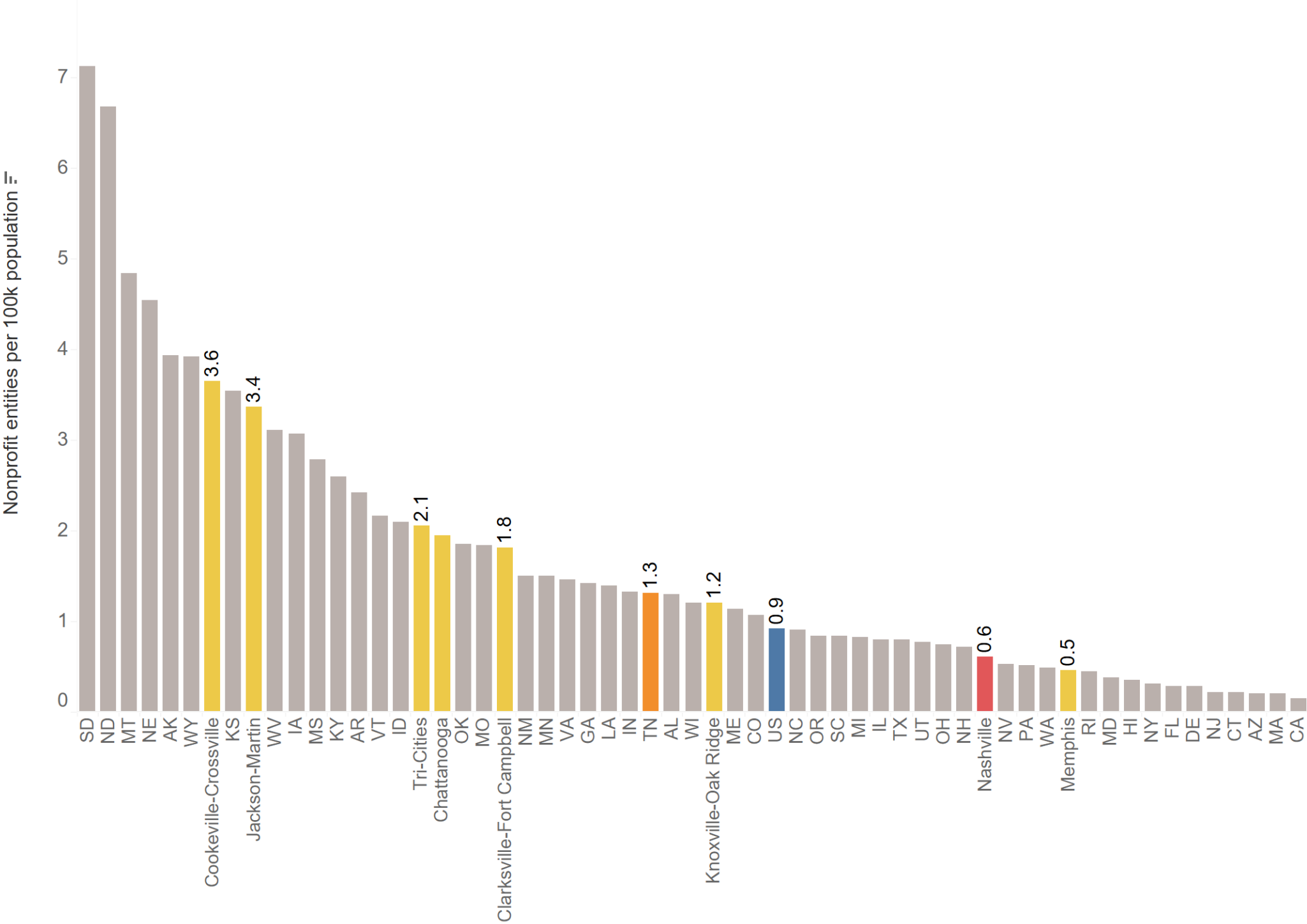


Source: US Cluster Mapping Project; Census ACS5

Collaborative Governance

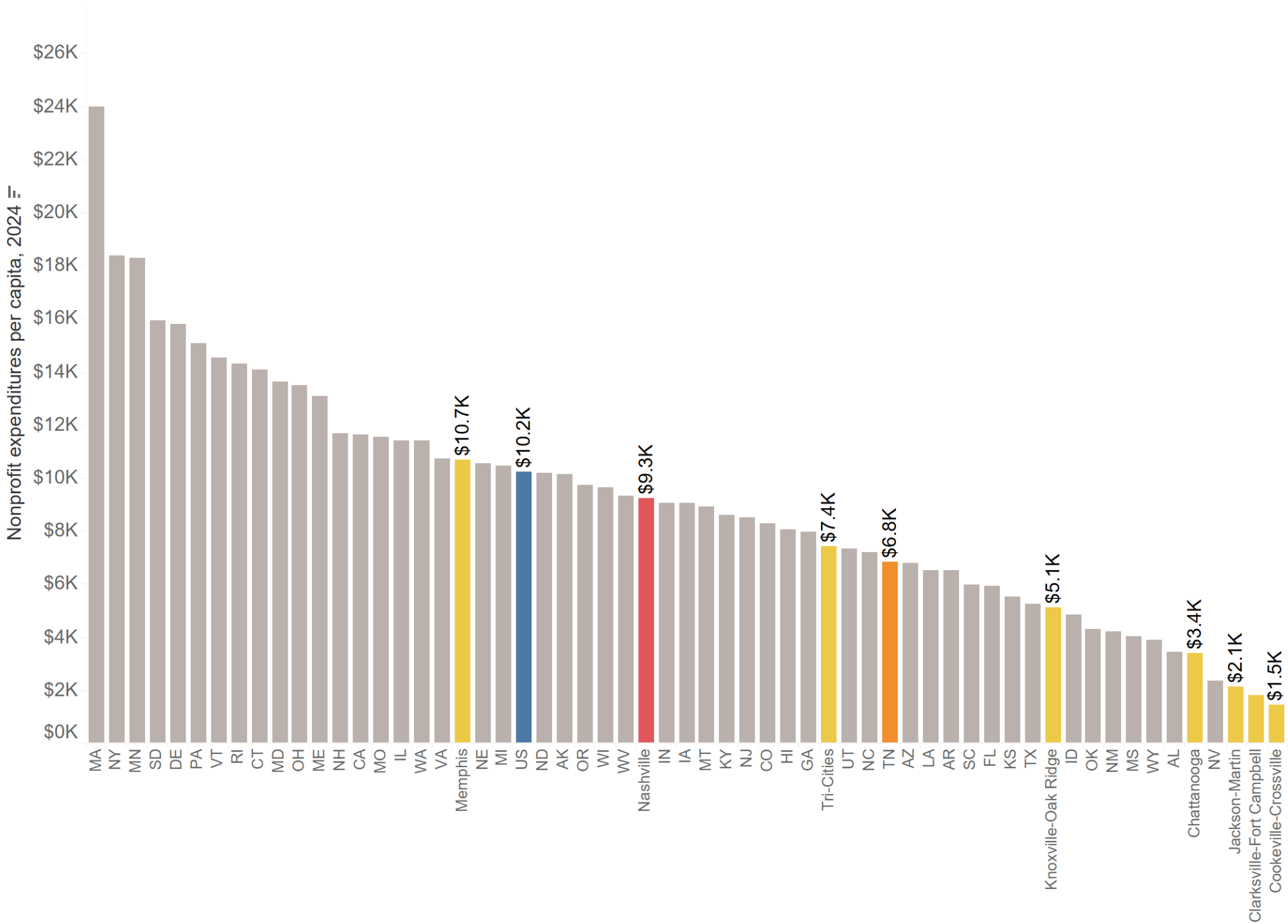
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Nonprofits per capita, 2024



Source: US Cluster Mapping Project; IRS 990, Census

Nonprofit Expenditures per Capita, 2024



Source: US Cluster Mapping Project; IRS 990, Census

Nashville: Nonprofits by Expenditures, 2024

	Expenditures (\$)
VANDERBILT UNIVERSITY MEDICAL CENTER	6,812,818,433
VANDERBILT UNIVERSITY	2,025,948,154
MIDDLE TENNESSEE ELECTRIC MEMBERSHIP CORP..	897,322,235
DIALYSIS CLINIC INC	744,815,158
CHS COMMUNITY HEALTH SYSTEMS INC VEBA TRUS..	708,282,972
BELMONT UNIVERSITY	405,658,061
NISSAN NORTH AMERICA INC VOLUNTARY EMPLOY..	253,835,490
LIPSCOMB UNIVERSITY	235,575,959
MEHARRY MEDICAL COLLEGE	200,660,969
CENTERSTONE OF INDIANA INC	191,456,887
GOODWILL INDUSTRIES OF MIDDLE TENNESSEE INC	152,824,498
HCA SHORT-TERM DISABILITY BENEFITS PLAN TRUS..	151,088,962
CENTERSTONE OF TENNESSEE INC	145,786,684
SECOND HARVEST FOOD BANK OF MIDDLE TENNES..	140,591,364
NATIONAL FEDERATION OF INDEPENDENT BUSINES..	123,555,281
DCI DONOR SERVICES INC	112,326,283
SOLES 4 SOULS	100,319,141
VOLUNTEER CORPORATE CREDIT UNION	98,234,687
TREVECCA NAZARENE UNIVERSITY	88,581,185
THE COMMUNITY FDN OF MIDDLE TN INC	87,243,890
YOUNG MENS CHRISTIAN ASSOCIATION OF NASHVI..	86,459,748
DAVIDSON TRANSIT ORGANIZATION	79,622,875
NMC SERVICES INC	78,403,380
MENTAL HEALTH COOPERATIVE INC	77,379,339
MECHANICAL LICENSING COLLECTIVE	70,586,120
CUMBERLAND UNIVERSITY	69,638,989
HOOSIER CARE INC	65,452,816
OPEN ARMS CARE CORPORATION	62,677,209
COUNTRY MUSIC ASSOCIATION INC	58,088,660
ALPHA OMICRON PI FRATERNITY INC	57,475,515
SHEET METAL WORKERS NATIONAL HEALTH FUND	55,422,978
KIPP NASHVILLE	55,342,054
ENSWORTH SCHOOL	52,479,286
UNITED FURNITURE WORKERS INSURANCE FUND	52,111,001
CENTERSTONE OF AMERICA INC	49,122,115

Excluding Health Care and Education

	Expenditures (\$)
CHS COMMUNITY HEALTH SYSTEMS INC V..	708,282,972
CENTERSTONE OF INDIANA INC	191,456,887
GOODWILL INDUSTRIES OF MIDDLE TENNE..	152,824,498
HCA SHORT-TERM DISABILITY BENEFITS P..	151,088,962
CENTERSTONE OF TENNESSEE INC	145,786,684
SECOND HARVEST FOOD BANK OF MIDDLE..	140,591,364
SOLES 4 SOULS	100,319,141
THE COMMUNITY FDN OF MIDDLE TN INC	87,243,890
YOUNG MENS CHRISTIAN ASSOCIATION OF..	86,459,748
MENTAL HEALTH COOPERATIVE INC	77,379,339
MECHANICAL LICENSING COLLECTIVE	70,586,120
OPEN ARMS CARE CORPORATION	62,677,209
COUNTRY MUSIC ASSOCIATION INC	58,088,660
CENTERSTONE OF AMERICA INC	49,122,115
SOUTHERN OPERATORS HEALTH FUND	46,727,803
UNITED WAY OF MIDDLE TENNESSEE INC	45,267,399
NASHVILLE CONVENTION & VISITORS BUR..	43,393,489
COUNTRY MUSIC FOUNDATION INC	43,095,448
ALIVE HOSPICE INC	42,214,328
CCA OF TENNESSEE LLC EMPLOYEEBENEF..	40,574,426
NASHVILLE C A R E S INC	39,406,529
CUMBERLAND HEIGHTS FOUNDATION INC	36,980,258
MARTHA OBRYAN CENTER INC	34,609,887
MIDWEST CHRISTIAN VILLAGES INC	34,037,360
SOUTHERN DISTRICT UBC HEALTH TRUST	32,779,073
SOUTHEAST COMMUNITY CAPITAL CORPO..	30,862,346
NASHVILLE ZOO INC	29,504,935
NASHVILLE RESCUE MISSION	29,234,370
NASHVILLE SYMPHONY ASSOCIATION	29,140,670
FEED AMERICA FIRST OF TENNESSEE	28,135,459
ONE GENERATION AWAY	27,325,732
BLAKEFORD AT GREEN HILLS CORPORATI..	26,137,741
CHRISTIAN HOMES INC	25,796,035
RICHLAND PLACE INC	25,376,983
LOCAL GOVERNMENT CORPORATION	21,161,184

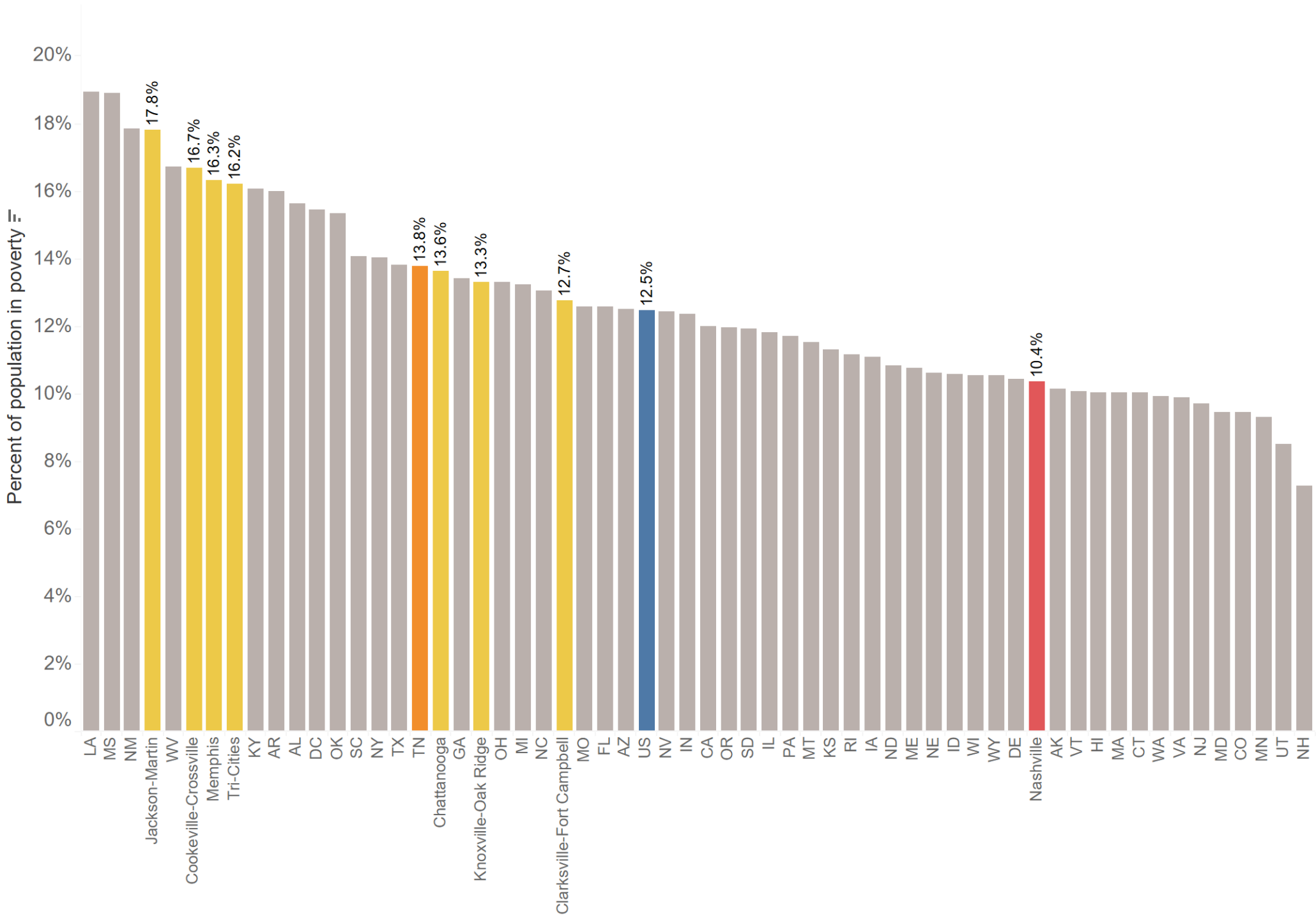
Nashville: TLAP Collaborative Governance Regional Inventory

Initiative	Mission Summary	Lead Organization	Counties Covered
Partnership 2030 (Nashville Area Chamber / Regional Public-Private Plan)	Align over 250 business, public sector, and civic partners to guide economic growth, workforce development, and quality-of-place across a 10 county Middle Tennessee region.	Nashville Area Chamber of Commerce via Partnership 2030	Cheatham, Davidson, Dickson, Maury, Robertson, Rutherford, Sumner, Williamson, Wilson (plus Montgomery)
Leadership Middle Tennessee (LMT)	Foster a network of civic, nonprofit, education, and business leaders equipped to drive cross-sector regional leadership and inclusive innovation.	Leadership Middle Tennessee	All nine listed counties
Middle Tennessee Tech Transfer and Economic Development Council	Advance collaboration across technology transfer, commercialization, workforce, and community engagement among the universities of the region and to foster strategic engagement with the business and investment sectors of the region.	Global Action Platform	Cheatham, Davidson, Dickson, Grundy, Maury, Montgomery, Putnam, Robertson, Rutherford, Sumner, Williamson, and Wilson
Metro Public Health Department Strategic Collaboration Framework	Strengthen alignment across government agencies, nonprofits, and health systems to advance health equity and inclusive workforce and social support strategies.	Nashville Metro Public Health Department	Davidson County, with strategic collaboration extending into the broader region
Nashville-Davidson Community Homelessness Coordination	Drive coordinated outreach, funding alignments, and public-private strategies to reduce homelessness and prevent recidivism across urban and suburban counties.	Metro Nashville/Community partners (e.g., continuum-of-care agencies)	Davidson and surrounding counties
Regional Transportation & Transit Governance (“Choose How You Move”)	Implement a \$3.1 billion multi-modal transit program funded via referendum, with ongoing cross-sector governance through Metro Council, Chamber, transit agencies, and nonprofits	Metropolitan Government of Nashville & Davidson County & WeGo Transit	Davidson (with design influence on adjacent counties)
Greater Nashville Regional Council	The mission of the Greater Nashville Regional Council is to assist local communities and state agencies in the development of plans and programs that guide growth and development in the most desirable, efficient, and cost-effective manner, while ensuring the continued long-term livability of the region.	Greater Nashville Regional Council (GNRC)	13 counties and 52 cities in Middle Tennessee

Quality of Life

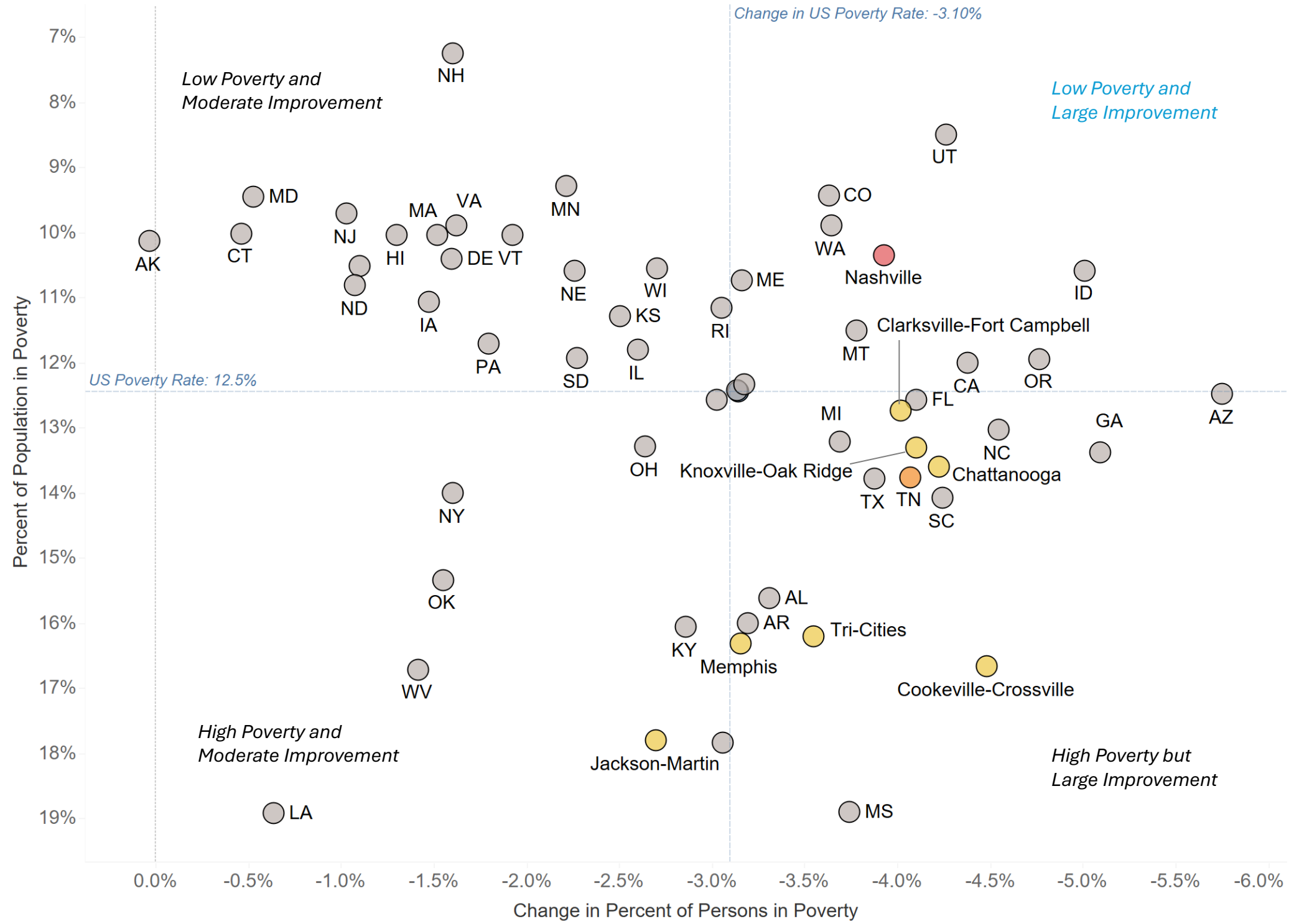
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Poverty Rate, 2024



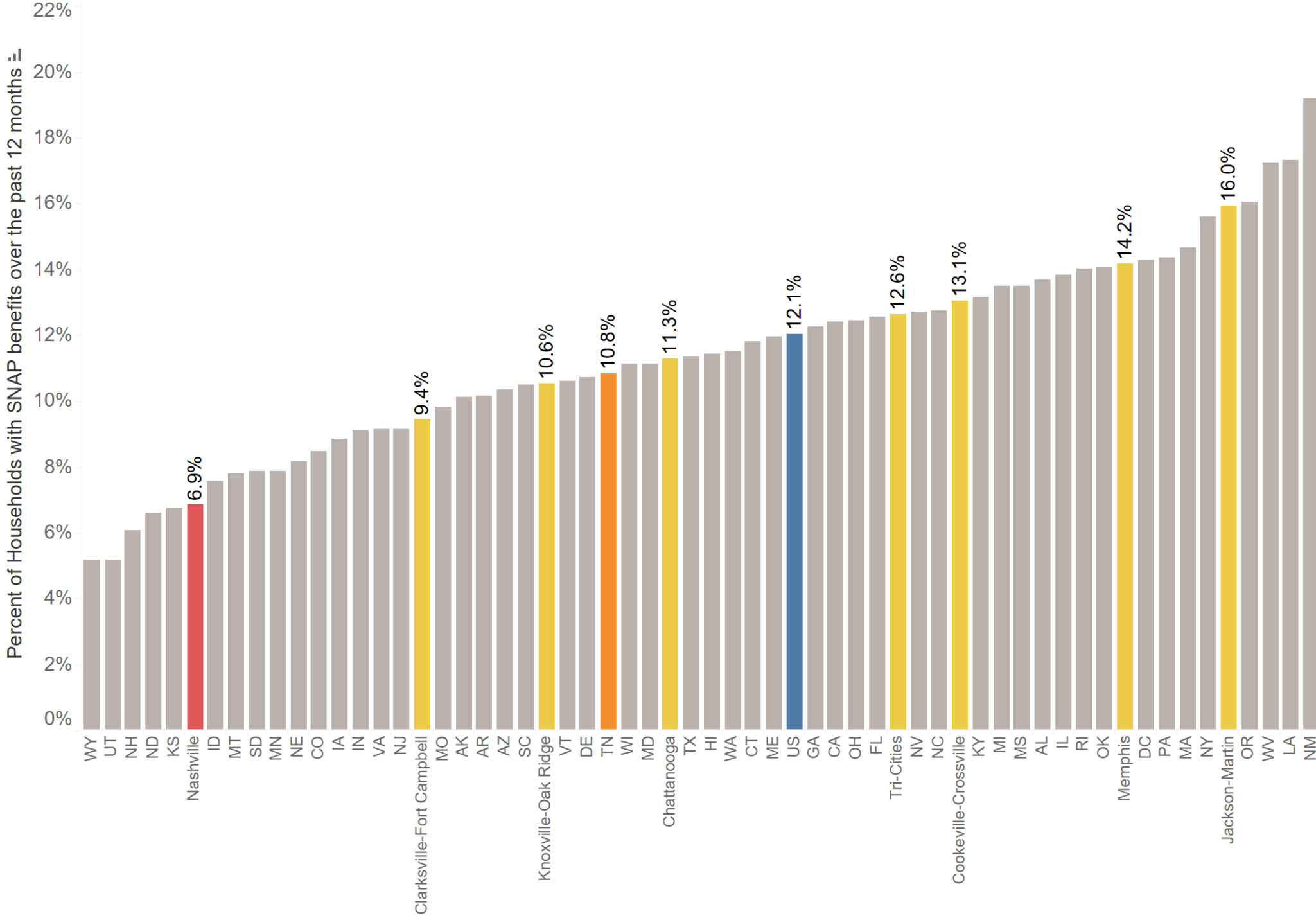
Source: US Cluster Mapping Project; ACS5

Poverty Rate, 2014-2024



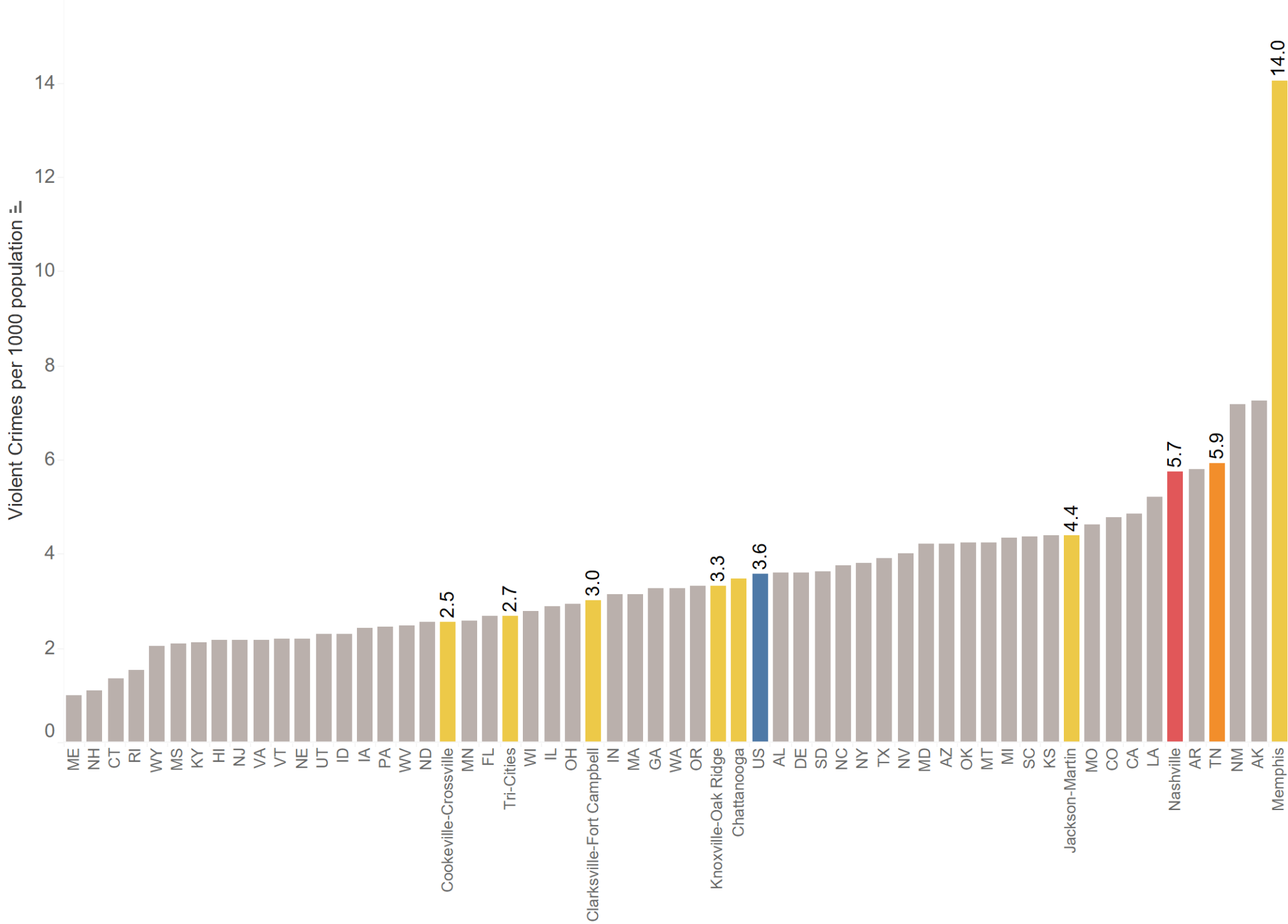
Source: US Cluster Mapping Project; ACS5

Households Receiving SNAP Benefits, 2024



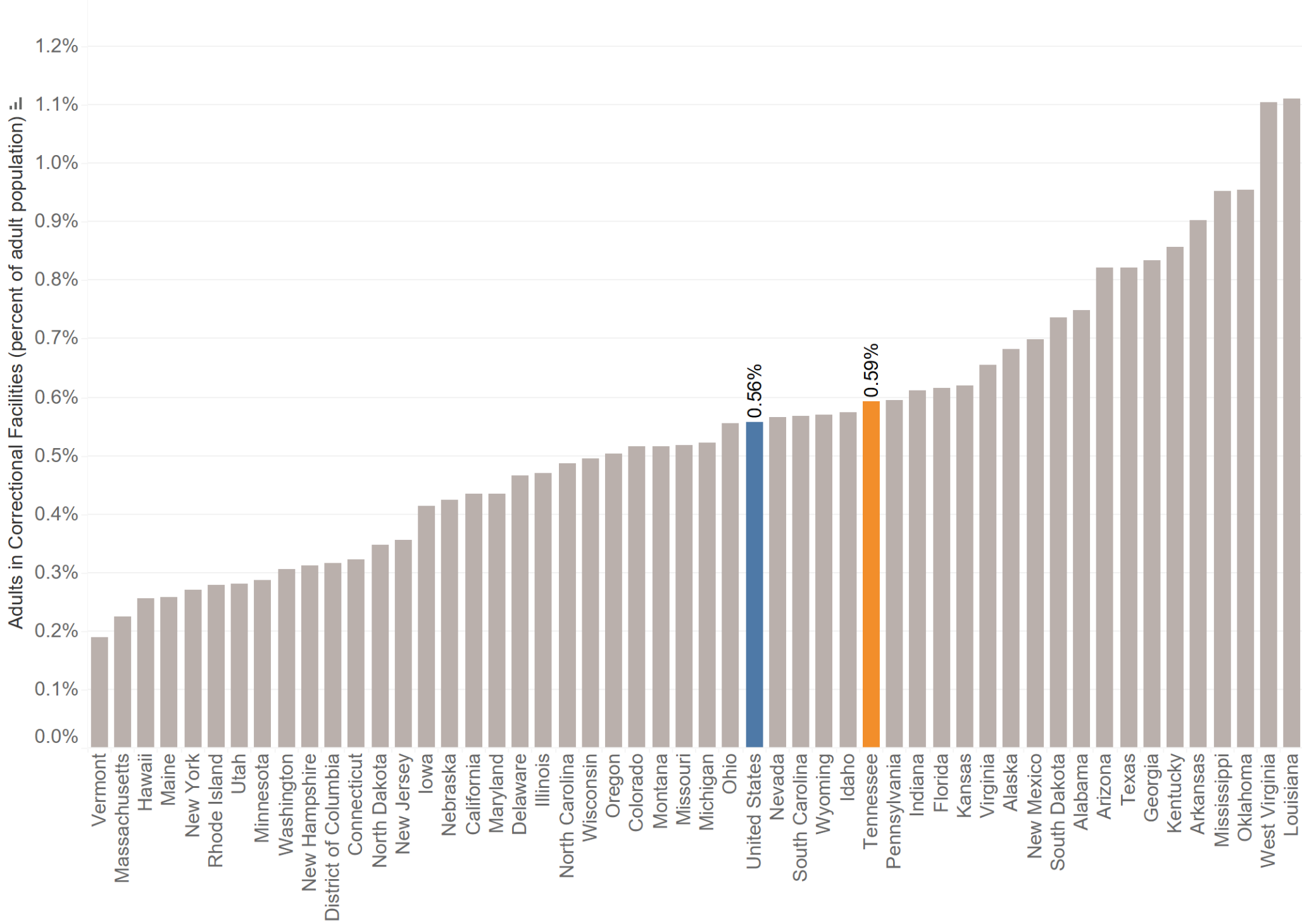
Source: US Cluster Mapping Project; Census ACS5

Violent Crime Rate, 2024



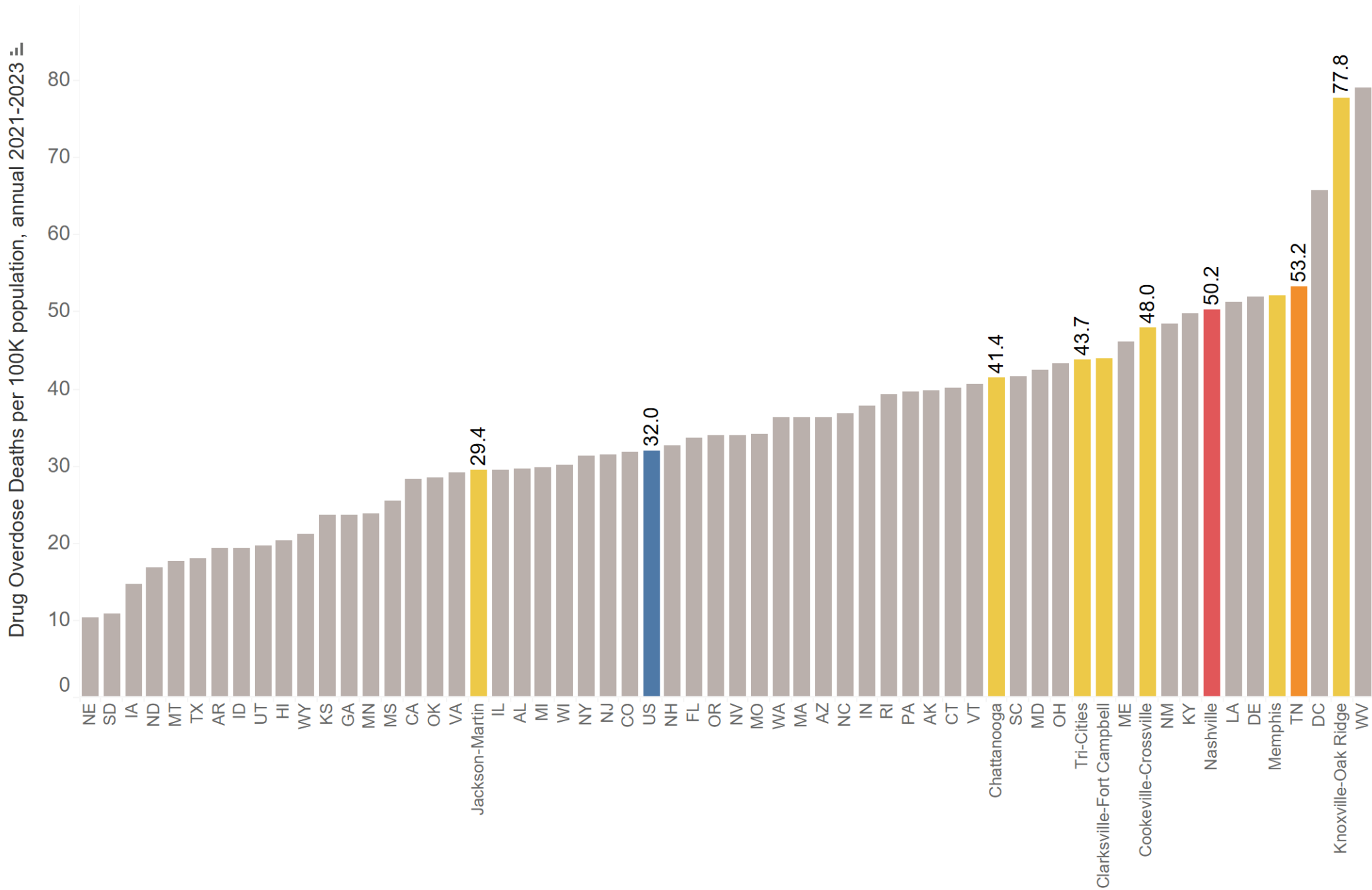
Source: US Cluster Mapping Project; FBI

Adults in Correctional Facilities, 2024



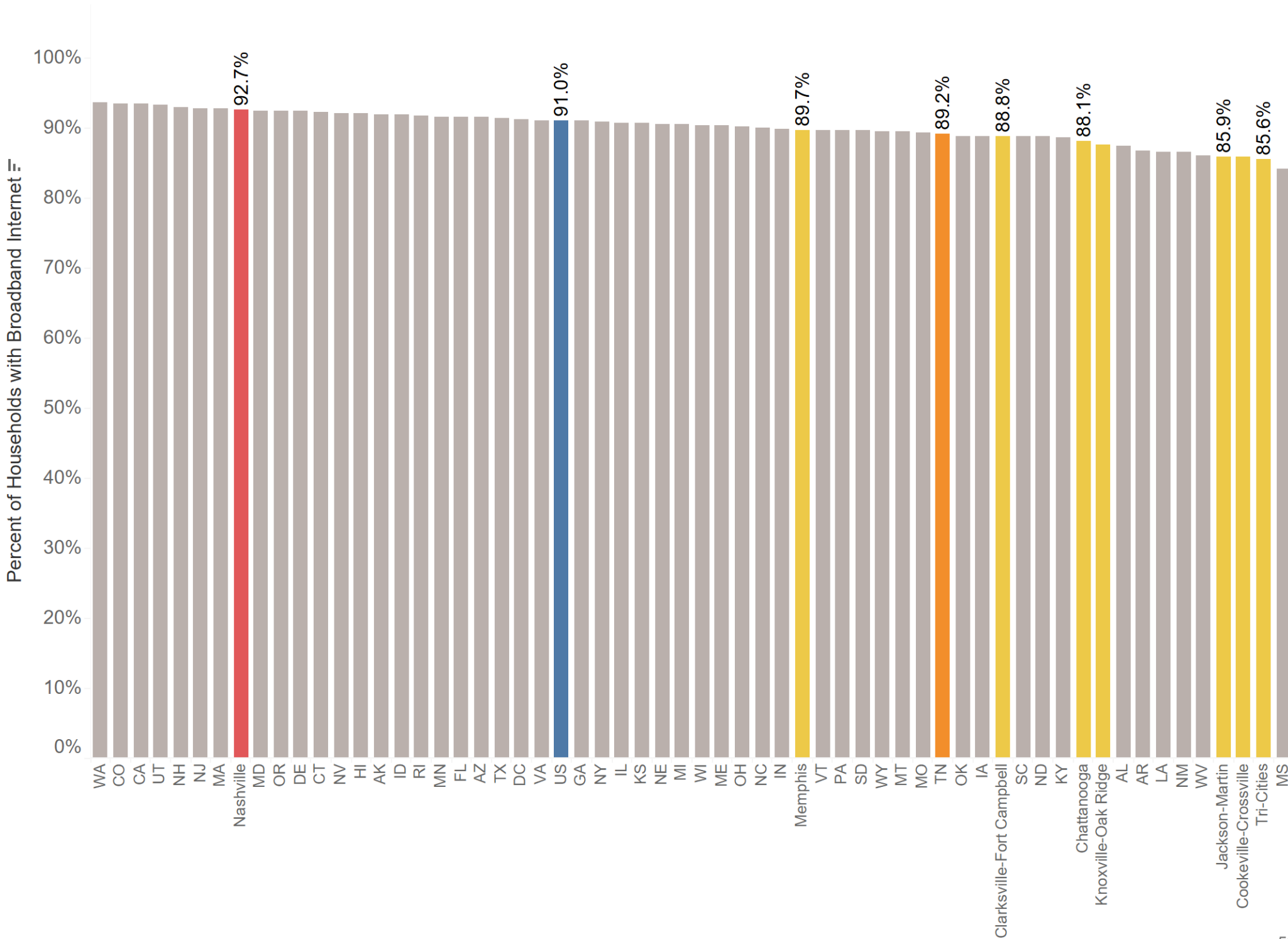
Source: US Cluster Mapping Project; EIA SEDS

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



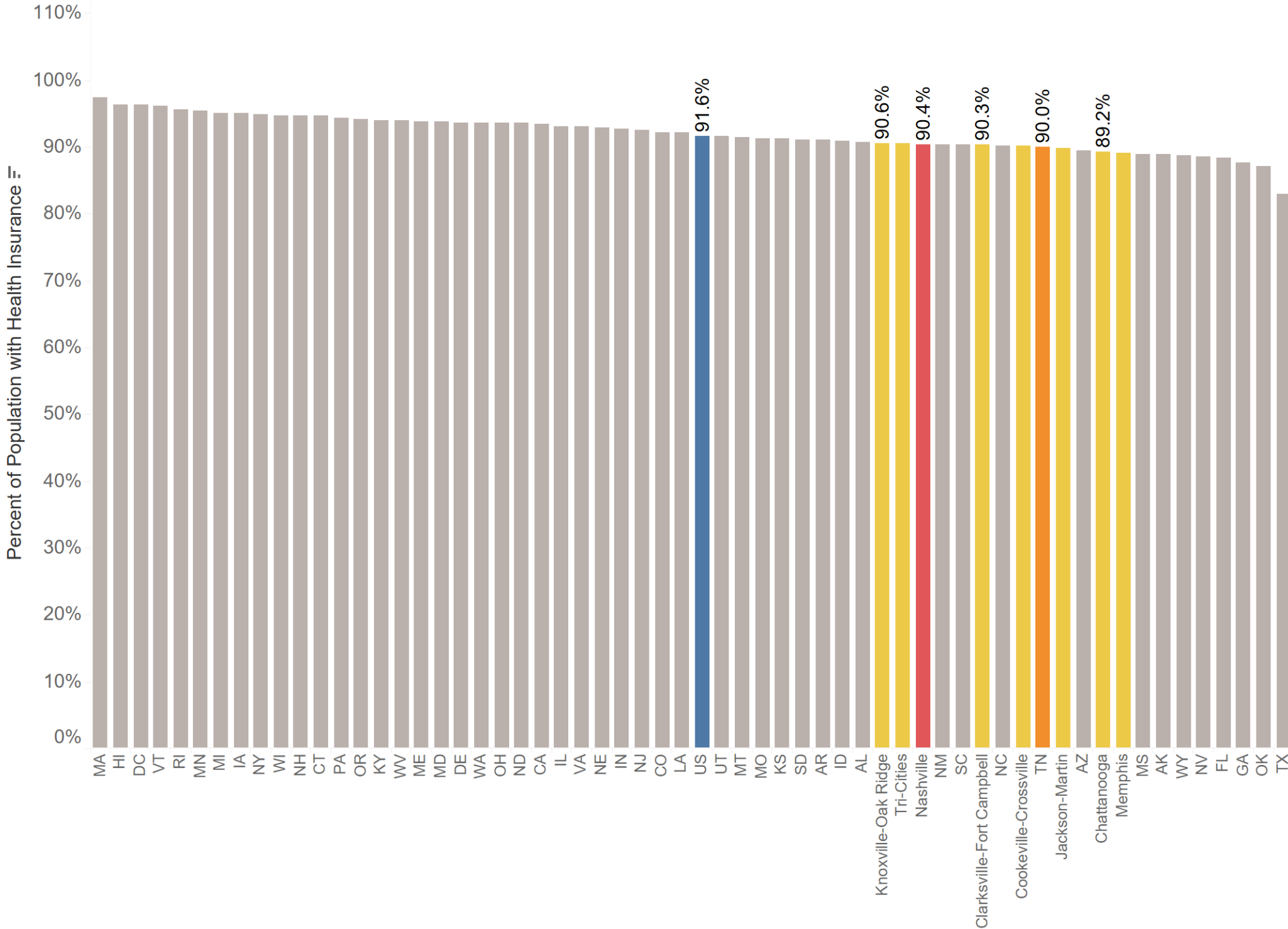
Source: US Cluster Mapping Project; CHRR. CDC, Census ACS

Broadband Adoption, 2024



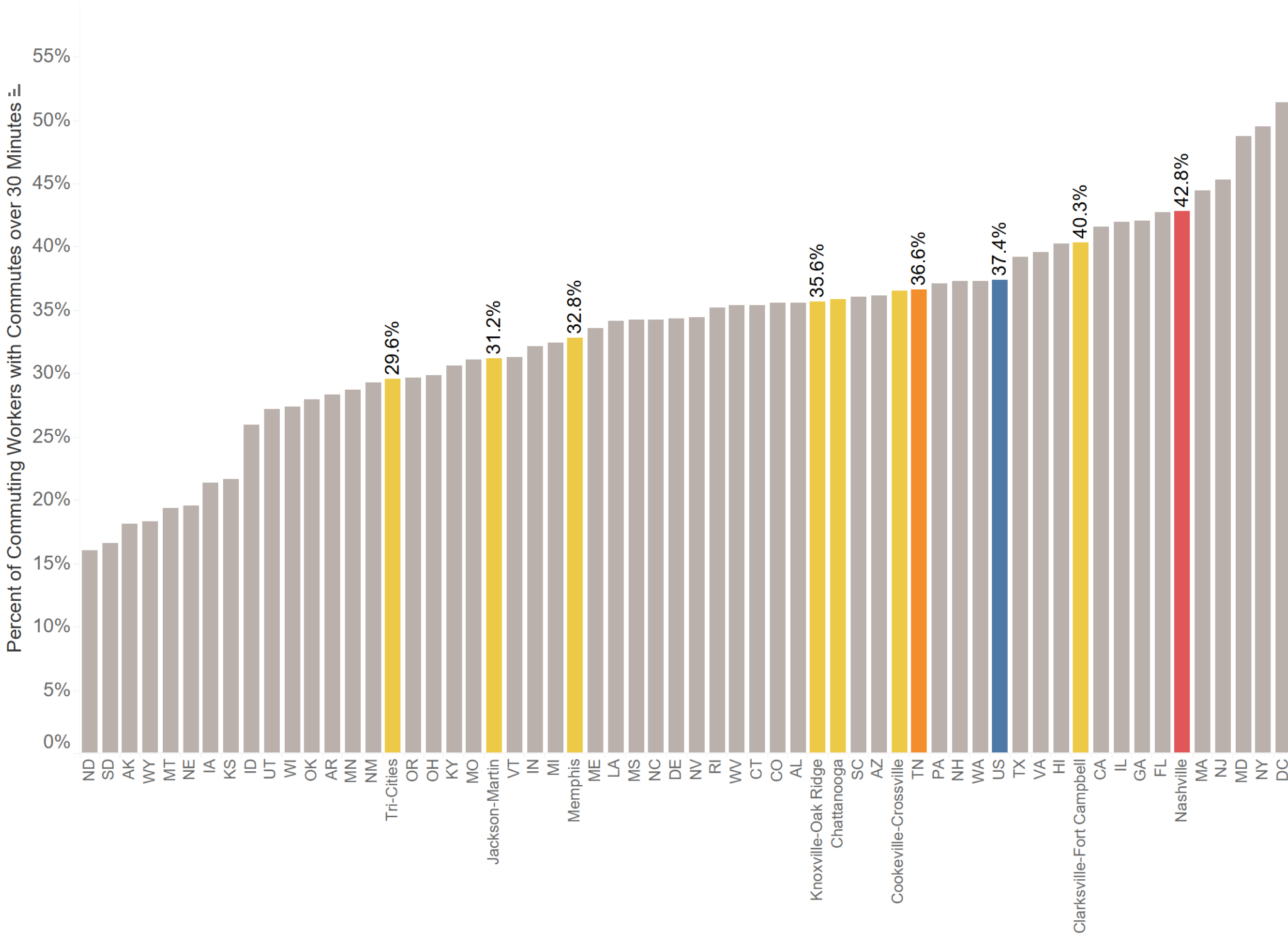
Source: US Cluster Mapping Project; Census ACS5

Health Insurance Coverage Rate, 2024



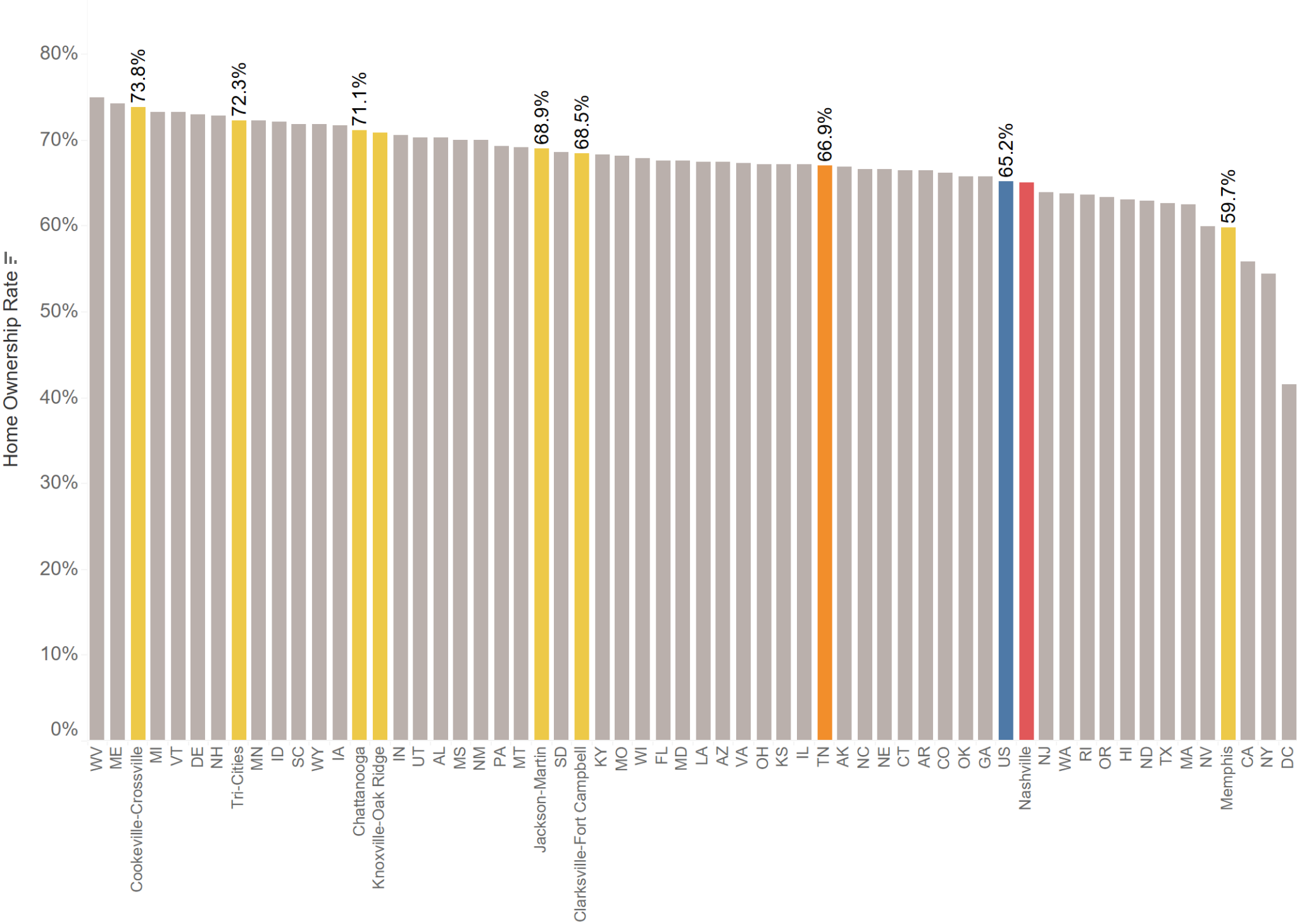
Source: US Cluster Mapping Project; Census ACS5

Percent of Workers with Long Commutes, 2024



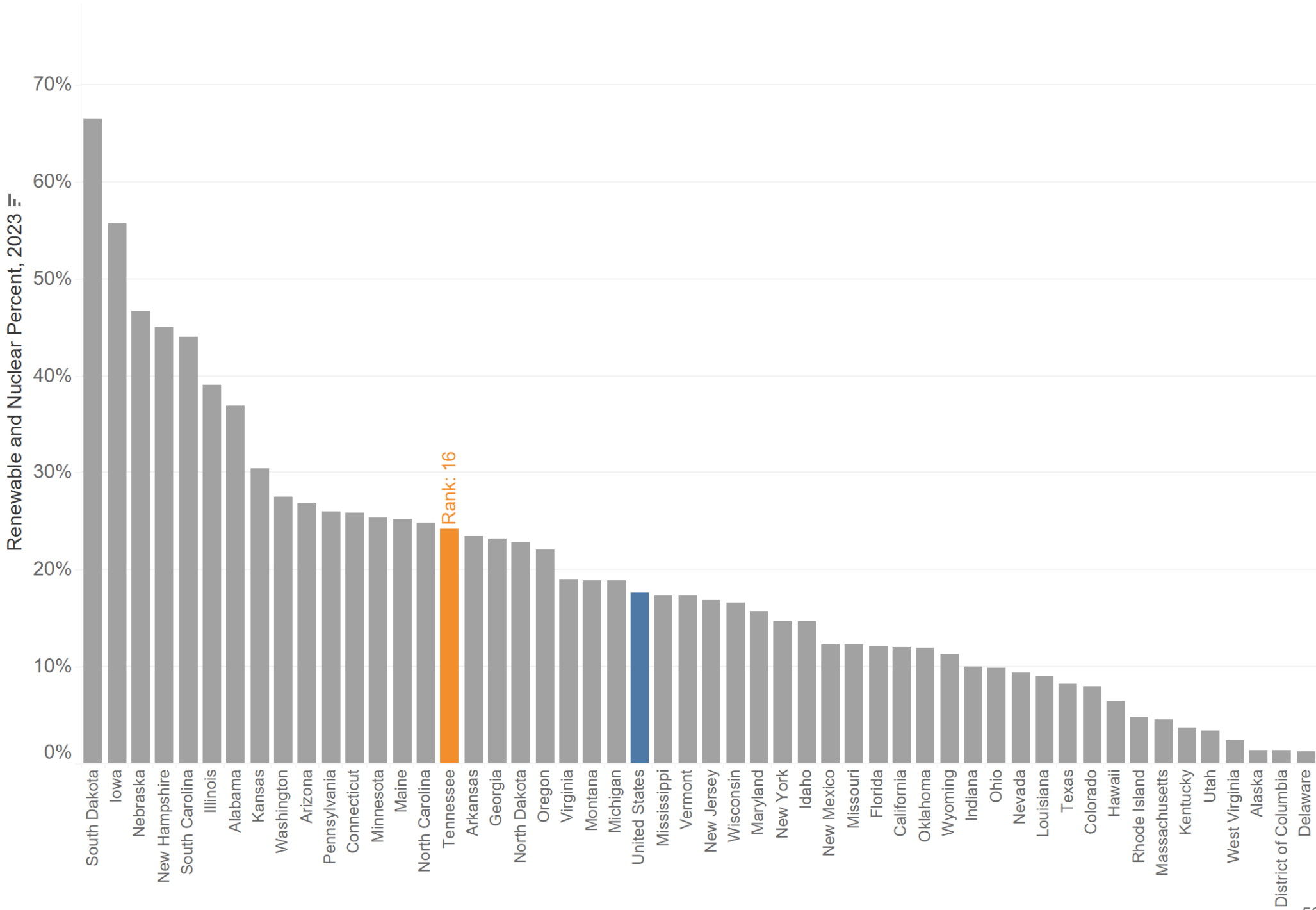
Source: US Cluster Mapping Project; Census ACS5

Home Ownership Rate, 2024



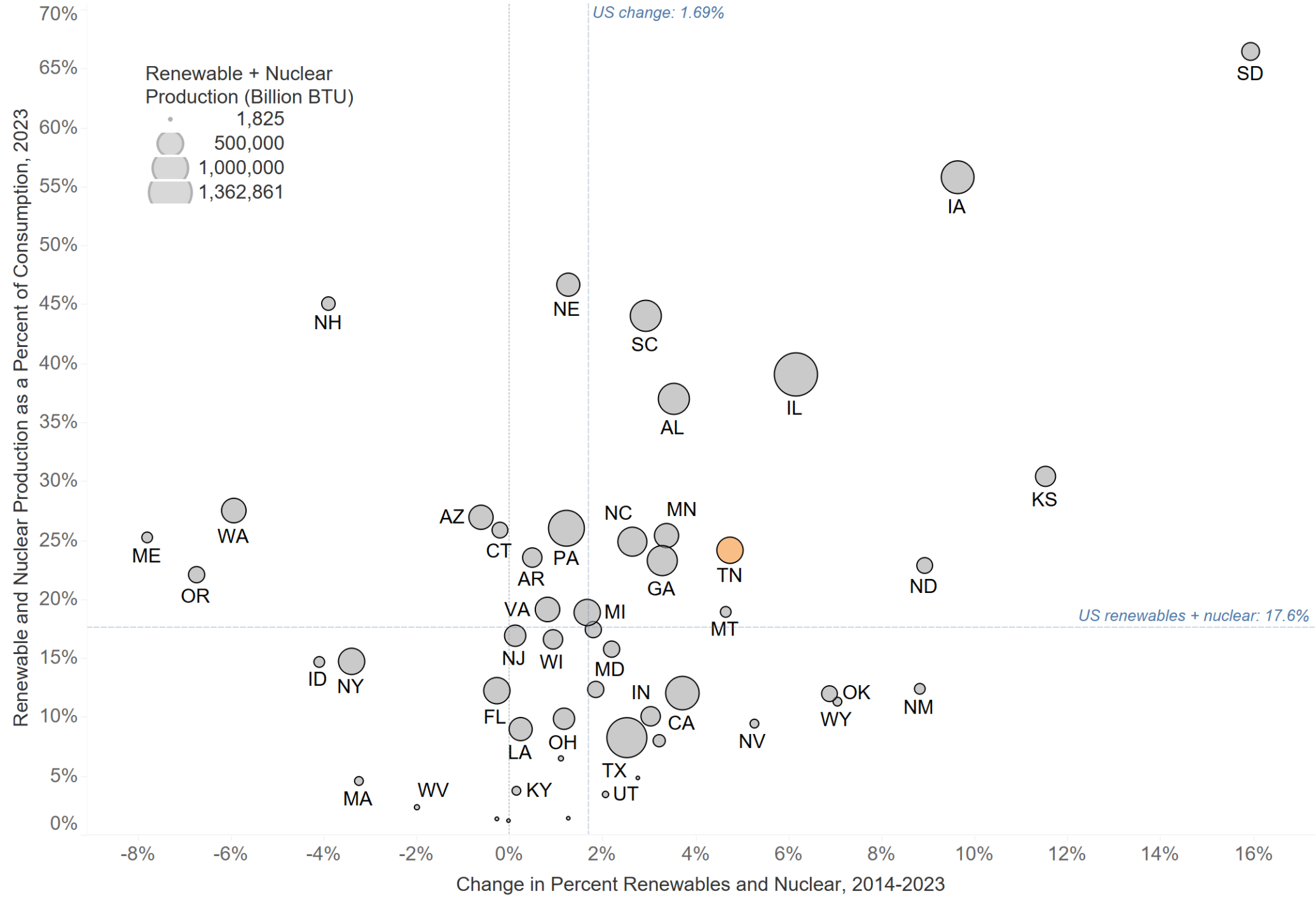
Source: US Cluster Mapping Project; Census ACS5

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



Source: US Cluster Mapping Project; EIA SEDS

Renewable and Nuclear Energy Production as a Percent of Consumption, 2014-2023



Source: US Cluster Mapping Project; EIA SEDS

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