

HEALTH CARE IN NASHVILLE

HEALTH CARE ADVANTAGES

Nashville is widely recognized as a health care industry capital and global health care industry leader. With a reputation for nurturing dynamic, innovative health care companies, the Nashville region has a rich tradition of entrepreneurship and strong industry management talent. Nashville has helped shape the nation's health care landscape for the past four decades and continues to improve the delivery of patient care across the globe.

The health care industry contributes an overall economic benefit of nearly \$30 billion and more than 200,000 jobs to the local economy annually.

More than 250 health care companies are located in Middle Tennessee, making it the region's largest industry. Sixteen publicly traded health care companies are headquartered in the region, with combined employment

of nearly 400,000 and \$70 billion in global revenue. The industry has also developed one of the most robust network of service providers who specialize in health care industry support in the nation – including legal, accounting, venture capital, and real estate services. The health care industry is also the region's largest and fastest-growing employer, directly employing 110,000.

LEADING HEALTH CARE COMPANIES

Source: Nashville Business Journal & ReferenceUSA, 2012

| COMPANY | LOCATION | # OF EMPLOYEES LOCALLY |
|--------------------------------------|--------------|------------------------|
| Vanderbilt University Medical Center | Nashville | 21,398 |
| HCA Inc. | Nashville | 7,000 |
| St. Thomas Health Services | Nashville | 6,500 |
| Community Health Systems | Franklin | 2,153 |
| National HealthCare Corp. | Murfreesboro | 2,060 |
| Emdeon | Nashville | 1,000 |
| HealthSpring Inc. (Cigna) | Franklin | 1,000 |
| Healthways | Franklin | 900 |
| MedSolutions | Franklin | 550 |
| Healthcare Management Systems | Franklin | 500 |
| DaVita | Brentwood | 450 |
| LifePoint Hospitals | Brentwood | 400 |
| Windsor Health Group | Franklin | 300 |
| HealthStream Inc | Nashville | 300 |
| M*Modal | Franklin | 275 |
| Healthcare Realty Trust | Nashville | 229 |
| American Home Patient | Brentwood | 220 |
| Brookdale Senior Living | Brentwood | 200 |
| Vanguard Health Systems | Nashville | 200 |
| AmSurg | Nashville | 200 |

Why is Nashville the Silicon Valley of health care? I might ask you, why wouldn't it be? I don't think there's any other choice. It has the right people at the right time at the right place to solve the needs of health care in our ever-changing world."

Dr. Thomas F. Frist, Jr.
Co-Founder and
Chairman Emeritus, HCA

ADVANTAGES OF DOING BUSINESS IN MIDDLE TENNESSEE

FAVORABLE GEOGRAPHIC LOCATION

Nashville is centrally located, allowing businesses to reach U.S. and international locations with ease and affordability.

SKILLED WORKFORCE

The area is home to more than 100,000 students who attend the region's 21 higher education institutions, with 60 percent choosing to stay in the area.

LOW COST OF DOING BUSINESS

Tennessee has one of the nation's lowest overall tax burdens. The U.S. Chamber of Commerce's Entprising States report named Tennessee the top state for low business taxes and regulations.

HIGH QUALITY OF LIFE

Nashville's celebrated arts and music scene is part of the fabric of our community. The city routinely places at the top of livability rankings.

DIVERSE MIX OF INDUSTRIES

Five major industries drive Middle Tennessee's economy: health care, corporate operations, advanced manufacturing, supply chain management, and music and entertainment.

HEALTH CARE AVERAGE WAGES

Source: US Department of Labor, 2012

| OCCUPATION | MEDIAN HOURLY WAGE | MEAN HOURLY WAGE | ANNUAL MEAN WAGE |
|--|--------------------|------------------|------------------|
| File clerk | \$12.80 | \$14.08 | \$29,280 |
| Health educators | \$17.82 | \$19.53 | \$40,610 |
| Healthcare practitioners and technical occupations | \$24.83 | \$31.33 | \$65,160 |
| Healthcare social workers | \$20.76 | \$21.28 | \$44,260 |
| Home health aids | \$9.32 | \$9.40 | \$19,550 |
| LPN | \$18.32 | \$18.81 | \$39,120 |
| Medical assistants | \$14.25 | \$14.73 | \$30,650 |
| Medical and clinical laboratory technicians | \$15.46 | \$16.27 | \$33,850 |
| Medical and health services managers | \$39.40 | \$45.15 | \$93,900 |
| Occupational health and safety specialists | \$28.60 | \$28.93 | \$60,180 |
| Purchasing managers | \$35.13 | \$37.25 | \$77,470 |
| Receptionists and information clerks | \$12.28 | \$12.64 | \$26,290 |
| Registered nurse | \$28.88 | \$30.99 | \$64,460 |
| Surgical technologists | \$18.61 | \$19.87 | \$41,330 |

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