

Assessing the Innovation and Sustainability Ecosystems in Nashville and Tennessee

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This report was submitted as graduate research at Harvard University on May 11, 2026, while survey collection was still underway.

Data collection continued after submission. The completed survey includes 90 responses from people working within or alongside Tennessee's innovation community.

The additional responses did not materially change the overall findings. Using the completed dataset, the Innovation Index increased from 69.1 to 69.9 and the Sustainability Index increased from 50.6 to 51.4. The relative strengths and areas of lower perceived maturity identified in the original report also remained broadly consistent.

The original May 2026 report is reproduced below without revision so that it remains an accurate record of the graduate research as submitted. References in the report to preliminary results, ongoing data collection and future phases should be read in that context.

The completed survey results, together with more recent public data and information about Tennessee's innovation economy, are presented in Tennessee, Connected, published in November 2026.

Publication note

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Executive Summary

This report presents a preliminary maturity assessment of the innovation and sustainability ecosystems in Nashville and Tennessee, based on an original survey administered via Qualtrics to ecosystem stakeholders across the state. The survey collected 56 responses from entrepreneurs, investors, professional service providers, educators, support organizations, and government officials. The data were analyzed using a structured index methodology that converts raw survey means into scores on a 0–100 scale.

The Innovation Index for Nashville and Tennessee currently stands at 69.1 out of 100, placing the ecosystem in the developing stage. The Sustainability Index stands at 50.6 out of 100, indicating an early/emerging stage with significant room for structured intervention. A roughly 18-point gap exists between the two indices, underscoring that while Nashville has made notable progress as an innovation hub, its sustainability maturity considerably lags.

Five priority areas for the innovation ecosystem are internationalization, government support for startups, support for social entrepreneurship, investor regulation and perception, and business–university linkages. Five priority areas for sustainability are public transportation, air travel reduction, sustainable vendor certification, GHG measurement, and composting and circular economy infrastructure.

An important methodological note regarding sustainability: recycling emerges as the highest-scoring dimension in this survey (68.3/100), yet Tennessee ranks among the worst states nationally in actual recycling performance, recording only a 5% packaging recycling rate and placing 48th in the 2023 Ball Corporation '50 States of Recycling' report. This divergence signals a significant gap between stakeholder awareness or aspirational behavior and real-world outcomes and warrants targeted policy attention and program infrastructure investment.

1. Area Description: Nashville & Tennessee

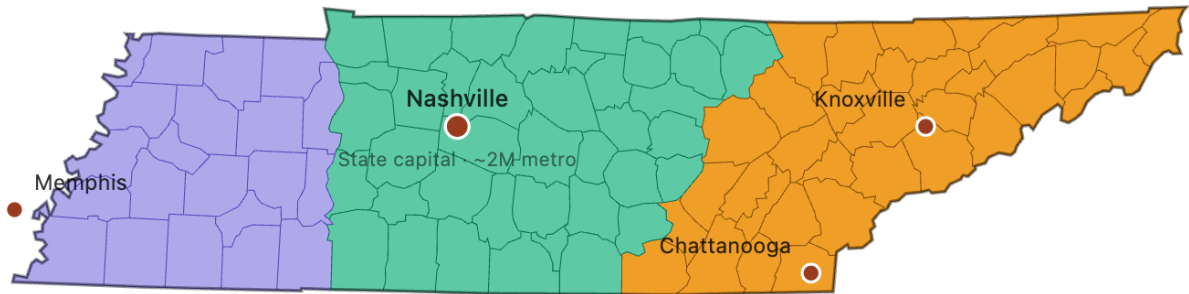
Geographic and Demographic Overview

This assessment focuses on Nashville, Tennessee, extended to the broader statewide innovation and sustainability ecosystem. Nashville is located in Middle Tennessee along the Cumberland River and serves as both the state capital and its largest metropolitan area. The Nashville–Davidson–Murfreesboro–Franklin metropolitan statistical area has a population of approximately 2 million residents. The state of Tennessee is home to roughly 7 million people, positioning it as a mid-sized but nationally relevant economy within the southeastern United States (U.S. Census Bureau, 2023; Nashville Area Chamber of Commerce, 2024).

West Tennessee
Agriculture · Logistics · Food processing

Middle Tennessee
Corporate HQ · Startups · Healthcare

East Tennessee
Manufacturing · Research · Energy



West Tennessee (21 counties)
Middle Tennessee (40 counties)
East Tennessee (34 counties)

Major city

Sources: US Census Bureau; Nashville Area Chamber of Commerce, 2024; IBISWorld, 2024; Tennessee Historical Society

Economic Character

Nashville's economy has diversified significantly over the past two decades. Major economic drivers today include healthcare services and management, higher education, advanced manufacturing, logistics and distribution, tourism, and a growing technology and startup sector. The region is a recognized national hub for healthcare corporate headquarters, with several multi-billion-dollar companies headquartered in the metro area.

At the state level, Tennessee's economy reflects three distinct but interconnected regional economies. West Tennessee is characterized by agriculture, food processing, and logistics. Middle Tennessee serves as the center for corporate headquarters and entrepreneurship. East Tennessee supports advanced manufacturing, research institutions such as Oak Ridge National Laboratory (ORNL), and energy-related innovation. Tennessee's central geographic location and robust transportation infrastructure further reinforce its role as a national logistics and manufacturing hub (IBISWorld, 2024).

Innovation Momentum

Tennessee's private capital ecosystem has entered a more durable and institutional phase. VC deal activity reached a record 179 deals in 2025, with cumulative deal value growing by more than one-third year-over-year to \$1.2 billion. PitchBook recently ranked Nashville as the world's fastest-growing startup ecosystem based on the velocity of venture activity, and Carta placed the metro among the top 15 U.S. metro areas for pre-seed funding (Greater Nashville Private Capital Association [GNPCA], 2025). Oracle's decision to relocate its global headquarters to Nashville is expected to catalyze further spinoff activity, talent attraction, and sector diversification.

At the same time, Tennessee ranked 38th nationally in transparency around economic incentives, and four major state incentive programs received transparency scores of zero, signaling a structural accountability gap with implications for attracting and retaining innovation-oriented investment (Think Tennessee, 2025).

2. Survey Overview & Respondent Demographics

Survey Instrument and Administration

The assessment uses a Qualtrics-based online survey developed by the capstone course framework to evaluate key dimensions of the local innovation and sustainability ecosystems. The survey was distributed via LinkedIn, LaunchTN, the Nashville Entrepreneur Center, personal professional networks, and Vanderbilt University contacts. The collection period began on February 3, 2026, and remains ongoing.

Sample Overview

As of the date of this preliminary report, the survey has collected 82 total responses, with 74 respondents identifying their community location (Q3) and 71 respondents identifying their professional role (Q5). This sample is sufficient for preliminary analysis but remains below the target of > 200 for statistical significance across demographic subgroups. Data collection will continue through August 2026 as part of Phase 2.

Geographic Distribution

Survey respondents were distributed across the state as follows, reflecting a strong Nashville-area concentration:

Geographic Area	Count	% of Responses
Nashville / Middle Tennessee	61	82%
Knoxville / East Tennessee	7	9%
Chattanooga	2	3%
Outside Tennessee	2	3%
Memphis / West Tennessee	1	1%
Other Tennessee	1	1%
Total	74	100%

Respondent Roles

The survey captured a broad representation of ecosystem actors across six primary role categories:

Role / Affiliation	Count	% of Respondents
Professional Services (law, medicine, marketing, etc.)	21	30%
Entrepreneur / Startup Founder or Employee	19	27%
Other / Not Specified	13	18%
Support Organization (incubator, accelerator, EC, etc.)	7	10%
Education / Research (university, research center)	7	10%
Investor	3	4%
Government / Public Sector	1	1%
Total	71	100%

Note: The sample is intentionally weighted toward active ecosystem participants (entrepreneurs, professional services, support organizations) and reflects the networks through which the survey was distributed. Government representation (1%) is lower than ideal and will be a targeted expansion area in Phase 2.

3. Innovation Ecosystem Maturity Assessment

Index Methodology

Innovation ecosystem scores are derived from survey questions Q13–Q23, which use a 0–3 ordinal scale. Each question asks respondents to select the statement that best characterizes a given dimension of their community's ecosystem. Individual aspect scores are calculated by multiplying the raw mean by 100 and dividing by 3, yielding a 0–100 scale. The scaled standard deviation is calculated in the same manner. The Innovation Index is the simple average of all 11 aspect scores.

Scale interpretation: A higher score indicates greater maturity or awareness. Lower-scoring dimensions therefore represent the greatest development priority. The table below is ranked in ascending order of mean score (lower mean = higher priority to address).

Overall Innovation Index

Nashville and Tennessee's Innovation Ecosystem Index score of 69.1 out of 100 places the region in the developing stage of maturity. While this reflects meaningful progress, particularly in business incubation, professional services diversity, and investor availability, the ecosystem exhibits significant internal variation (standard deviation of 26.9), with individual dimension scores ranging from a low of 48.3 for internationalization to a high of 88.0 for professional diversity and university engagement. This spread signals that Nashville's innovation strengths are concentrated in a few well-established dimensions while several foundational areas remain underdeveloped.

Innovation Ecosystem Ranking (Ascending Order of Mean Score)

Lower average score = lower perceived maturity = higher development priority.

Rank	Innovation Ecosystem Aspect	Index Score (0–100)	Std Dev	Asymmetry	Priority Level
#1 (Lowest)	Internationalization of the Ecosystem	48.3	31.0	No	HIGH
#2	Government Support for Innovation	59.0	28.0	No	HIGH
#3	Investor Perception & Regulation	60.0	29.7	No	HIGH
#4	Support for Social Entrepreneurship	60.7	31.3	No	HIGH
#5	Financial Frameworks	69.3	32.0	No	MEDIUM
#6	Intellectual Property	70.7	29.7	No	MEDIUM
#7	Business–University Linkages	72.0	25.3	Yes	MEDIUM
#8	Availability of Investors	72.0	26.3	Yes	MEDIUM
#9	Business Accelerators	76.3	24.3	No	LOW
#10	Business Incubators	83.7	22.0	Yes	LOW
#11 (Highest)	Professional Diversity & Universities	88.0	16.0	Yes	LOW

Source: Author's primary survey data. Nashville & Tennessee Innovation & Sustainability Ecosystem Survey, collected via Qualtrics, February–April 2026. N = 42–47 per innovation question. Asymmetry indicates a non-normal distribution, suggesting divergent stakeholder perceptions within the ecosystem.

4. Top 4 Innovation Metrics to Fix & Recommendations

The four lowest-scoring innovation dimensions represent the most urgent areas for ecosystem investment. For each, targeted recommendations are provided based on best practices from peer ecosystems and applicable national research.

Priority #1 — Internationalization of the Ecosystem (Score: 48.3 / 100)

Nashville's startup ecosystem is growing rapidly in domestic deal velocity but remains largely domestically oriented. Peer cities in the Driving Regional Innovation framework (Indiana Business Research Center, 2021) demonstrate that intentional internationalization, through cross-border delegations, foreign direct investment attraction, and diaspora engagement, significantly accelerates innovation diffusion.

- Launch a Nashville Global Innovation Exchange: Partner LaunchTN with TNECD to create a formal international delegation program, sending Tennessee founders and investors to leading ecosystems (Austin, Denver, Israel, Singapore) and hosting reciprocal inbound visits annually.
- Establish a Tennessee International Entrepreneur Program: Model on similar programs in Georgia and North Carolina to attract internationally trained founders with conditional visa support.
- Decision makers: TNECD Commissioner Stuart McWhorter, LaunchTN CEO, Nashville Mayor's Office of Economic Development, Vanderbilt University International Office.

Priority #2 — Government Support for Innovation (Score: 59.0 / 100)

Tennessee ranked 38th nationally in transparency for economic incentives, with four major programs receiving transparency scores of zero (Think Tennessee, 2025). Stakeholder perception of government support is correspondingly modest, reflecting a gap between available programs and ecosystem awareness.

- Create a "TN Startup Navigator" portal: Consolidate all state grant, incentive, and support programs into a single, publicly searchable dashboard with clear eligibility criteria, application timelines, and outcome reporting.
- Expand the IRIS Grant Program: Governor Lee's \$25 million IRIS Grant Program is a strong foundation; increase allocation and create a dedicated SME/startup track with streamlined applications.
- Establish a Legislative Startup Caucus: Engage Tennessee General Assembly members to create a bipartisan innovation caucus, using the Kauffman Indicators of Entrepreneurship (indicators.kauffman.org) as a benchmarking tool to compare Tennessee's startup activity rates,

early job creation, and survival rates against peer states like Colorado, North Carolina, and Georgia.

- Pitch to: Tennessee General Assembly Commerce Committee, TNECD Office of Innovation (Nathan Buttrey), Governor's Office of Economic Development.

Priority #3 — Investor Perception & Regulation (Score: 60.0 / 100)

The regulatory environment for diverse investor types, including angel investors, family offices, and crowdfunding platforms, is perceived as underdeveloped. Tennessee has not fully modernized its investor protection and accreditation framework to match the pace of its venture ecosystem growth.

- Modernize the Invest Tennessee Exemption: Update Tennessee's existing intrastate crowdfunding framework, currently capped at \$1 million with a \$10,000 per-investor limit for unaccredited investors, to raise offering limits and explicitly authorize online funding portals, following updates made by Georgia and Texas that have meaningfully expanded capital access for early-stage founders.
- Expand the InvestTN Angel Investor Pipeline: Partner LaunchTN's InvestTN program with GNPCA and Vanderbilt Owen Graduate School of Management to develop an annual Angel Investor Readiness Program, covering SEC accreditation requirements, term sheet fundamentals, and portfolio construction, targeting professionals with investable capital who are adjacent to but not yet active in Tennessee's startup ecosystem.
- Develop a Tennessee Angel Network Directory: Create a publicly accessible, searchable directory of Tennessee-based angel investors and family offices to reduce information asymmetry for early-stage founders.
- Pitch to: Tennessee Secretary of State (Securities Division), LaunchTN, GNPCA

Priority #4 — Support for Social & Sustainable Entrepreneurship (Score: 60.7 / 100)

Social and sustainable entrepreneurship remains underdeveloped in the ecosystem relative to commercial healthcare and tech verticals. Benefit corporation frameworks, impact investing networks, and ESG-oriented accelerators are sparse in Tennessee compared to peer states.

- Launch a Tennessee Impact Accelerator: Partner Vanderbilt's Owen Graduate School of Management with LaunchTN to create a dedicated accelerator for social enterprises, with a focus on healthcare access, clean energy, and rural development.
- Adopt a Tennessee Benefit Corporation (PBC) Registry: Update state statute to create a public benefit corporation designation with clear reporting standards, lowering the barrier for founders building for dual impact.

- Create an ESG Investment Track at GNPCA: The Greater Nashville Private Capital Association (GNPCA) can formalize ESG and impact investing working groups to attract mission-aligned capital to Tennessee startups.
- Pitch to: Vanderbilt Owen School, GNPCA Board, LaunchTN, Tennessee General Assembly Business & Utilities Committee.

5. Sustainability Ecosystem Maturity Assessment

Index Methodology

Sustainability scores are derived from survey question Q24, which uses a 1–6 scale measuring stakeholder adoption or awareness of 11 sustainability behaviors and practices. Individual dimension scores are calculated by multiplying the raw mean by 100 and dividing by 6, yielding a 0–100 scale. The scaled standard deviation is calculated in the same manner. The Sustainability Index is the simple average of all 11-dimension scores.

Scale interpretation: A higher score indicates greater adoption or awareness. Lower-scoring dimensions represent the greatest areas of need. The table below is ranked in ascending order of mean score.

Critical Contextual Note: The Recycling Paradox

Important Methodological Caution: Recycling scores the highest of all sustainability dimensions in this survey (68.3/100). However, Tennessee ranks 48th nationally in actual packaging recycling performance, with only a 5% real recycling rate, the third lowest in the nation (Ball Corporation, 2023; WJHL, 2024). The State Recycling Partnership's 2024 report further shows Tennessee's program participation rate at 47%, below the national average of 59%. This divergence between survey perception and objective outcome data is among the most important findings of this report. It suggests that stakeholders overestimate recycling performance, likely conflating putting materials in recycling bins with actual recycling outcomes. Infrastructure gaps, program rollbacks (e.g., Kingsport and Jonesborough ended curbside programs in 2023), and the absence of Extended Producer Responsibility (EPR) or Recycling Refund legislation are contributing factors.

Overall Sustainability Index

Nashville and Tennessee's Sustainability Ecosystem Index score of 50.6 out of 100 places the region in the early/emerging stage of maturity. Eight of eleven dimensions exhibit asymmetry in stakeholder responses, reflecting wide divergence in sustainability awareness and practice across the ecosystem. Individual dimension scores range from a low of 37.0 for minimizing air travel to a high of 68.3 for

recycling, though as noted above, that ceiling score warrants significant caution given the documented gap between stakeholder perception and Tennessee's objectively poor recycling performance at the state level.

Sustainability Dimension Ranking (Ascending Order of Mean Score)

Lower average score = lower perceived adoption/awareness = higher development priority.

Rank	Sustainability Dimension	Index Score (0–100)	Std Dev	Asymmetry	Priority Level
#1 (Lowest)	Minimize Air Travel	37.0	22.2	No	HIGH
#2	Use Public Transportation	38.3	19.5	No	HIGH
#3	Sustainable Vendor Certification	41.5	25.5	Yes	HIGH
#4	GHG Measurement	46.0	20.7	Yes	MEDIUM
#5	Composting	50.0	16.3	No	MEDIUM
#6	Know & Consume Sustainable Food	52.2	21.7	Yes	MEDIUM
#7	Work from Home / Reduce Transport	53.3	25.5	Yes	MEDIUM
#8	Reduce Water Consumption	53.3	21.3	Yes	MEDIUM
#9	Reduce Electricity Consumption	58.2	23.3	Yes	LOW
#10	Reduce Fuel Consumption	58.7	24.0	Yes	LOW
#11 (Highest)	Recycling (Paper, Metal, Glass)	68.3	24.0	Yes	LOW

Source: Author's primary survey data, collected via Qualtrics, February–April 2026. N = 36–39 per sustainability question. Recycling scores highest in survey perception but Tennessee ranks 48th nationally in actual recycling rates, see note above.

6. Top 3 Sustainability Opportunities & Recommendations

Given the recycling paradox identified above, this section prioritizes the three lowest-scoring and most structurally addressable sustainability dimensions.

Priority #1 — Minimize Air Travel (Score: 37.0 / 100)

Air travel minimization ranked as the top sustainability priority in the survey and showed significant asymmetry of information, meaning awareness and practice vary widely across Tennessee's business community. As one of the fastest-growing aviation markets in the Southeast, Nashville faces a tension

between its expanding corporate footprint and the emissions burden of business travel. Tennessee lacks both the institutional incentives and the clean energy infrastructure to meaningfully address aviation's role in its carbon footprint.

- Launch a Tennessee Sustainable Aviation Fuel (SAF) R&D Initiative anchored at Oak Ridge National Laboratory, leveraging the state's #1 national ranking in nuclear energy development and its existing \$63M innovation investment in advanced energy. The program would target bio-based and hydrogen-derived SAF production, positioning Tennessee as a national leader in decarbonizing aviation rather than simply reducing flights.
- Designate Nashville International Airport (BNA) as a Clean Aviation Energy Hub, modeled on European airport-as-energy-campus initiatives, integrating onsite SAF blending and distribution infrastructure with renewable energy generation. BNA's ongoing capital expansion presents a time-sensitive opportunity to embed clean energy infrastructure into the airport's long-term buildout.
- Pitch to: TNECD Office of Innovation, Oak Ridge National Laboratory Technology Transfer Office, Tennessee Valley Authority (TVA), BNA/Metropolitan Nashville Airport Authority, LaunchTN, U.S. Department of Energy Office of Clean Energy Demonstrations

Priority #2 — Public Transportation & Sustainable Mobility (Score: 38.3 / 100)

Nashville is one of the largest U.S. metros without a commuter rail or light rail system. Car dependency is structurally embedded in Middle Tennessee's built environment, limiting both sustainability performance and economic equity.

- Advocate for expanded Bus Rapid Transit (BRT) corridors in the Nashville Metro, building on the WeGo Public Transit network and targeting the I-65 and Murfreesboro Road corridors.
- Incentivize employer transit benefits and EV fleet conversions through state tax credits, targeting the region's major healthcare and corporate HQ employers.
- Partner with WeGo Public Transit to pilot a Mobility-as-a-Service (MaaS) app, integrating bus, bikeshare, and rideshare options into a single trip-planning platform.
- Decision makers: Metro Nashville Mayor's Office, WeGo Public Transit, Tennessee Department of Transportation (TDOT), Nashville MPO, Tennessee General Assembly.

Priority #3 — GHG Measurement & Sustainable Vendor Certification (Scores: 46.0 & 41.5 / 100)

Greenhouse gas measurement and supply chain sustainability remain the weakest institutionalized practices. Most Tennessee businesses lack the infrastructure, incentives, or awareness to measure and report emissions or to certify their vendors.

- Launch a Metro Nashville GHG Disclosure Program for businesses with more than 50 employees, modeled on the Carbon Disclosure Project and Chicago's similar initiative.
- Create a Tennessee Sustainable Supplier Registry and certification process, administered by TNECD, recognizing businesses that meet defined sustainability criteria in their procurement practices.
- Partner with Vanderbilt and Lipscomb Universities' Sustainability Programs and the Tennessee Small Business Development Center to offer free SME emissions auditing workshops statewide.
- Pitch to: TNECD Office of Innovation, Metro Nashville Office of Sustainability, Nashville Chamber of Commerce, Vanderbilt Sustainability Initiative, Lipscomb University

7. Overall Maturity Assessment

Index Score Summary

Ecosystem Dimension	Index Score (0–100)	Development Stage	Key Observation
Innovation Ecosystem	69.1	Developing	Strong incubation & academic base; weak internationalization & gov support
Sustainability Ecosystem	50.6	Early / Emerging	Perception-reality gap in recycling; mobility infrastructure critical gap
Combined Ecosystem Average	59.85	Developing	~18-point gap between ecosystems signals imbalanced development

Interpretation

Nashville and Tennessee's combined ecosystem score of 59.85 out of 100 places the region at the lower end of the developing stage. The 18-point gap between the Innovation Index (69.1) and the Sustainability Index (50.6) is among the most consequential findings of this assessment. Several dynamics underpin this gap:

- Nashville's innovation momentum, driven by healthcare, technology, and private capital formation, has outpaced the development of sustainability infrastructure, policy, and institutional capacity.

- High variance across both ecosystems (Innovation Std Dev: 26.9; Sustainability: 8 of 11 dimensions asymmetric) suggests that ecosystem development is highly uneven and concentrated in specific sectors, geographies, and demographic groups.
- Addressing sustainability gaps is not merely an environmental imperative, it is a strategic economic differentiator. As ESG expectations from corporate tenants, talent, and global investors increase, Nashville's ability to compete with Denver, Austin, and Raleigh-Durham will increasingly depend on demonstrable sustainability performance.

The overall ecosystem is best described as a momentum market, growing rapidly in innovation capacity, nascent in sustainability practice, and positioned for transformative impact.

8. Stakeholder Engagement & Implementation Roadmap

Where to Pitch: Key Decision Makers by Sector

Stakeholder Group	Organizations / Venues	Key Decision Makers	Possible Deliverables
State Government	TNECD, TN General Assembly Commerce & Energy Committees, Governor's Office	Commissioner Stuart McWhorter (TNECD); Senate Commerce Chair; House Finance Chair	Policy brief; focus on economic ROI of ecosystem investment
Metro Government	Metro Nashville Mayor's Office, Office of Sustainability, Nashville MPO	Mayor Freddie O'Connell's economic development team; Chief Sustainability Officer	Executive briefing; BRT and GHG program proposals
Business Community	Nashville Chamber of Commerce, Williamson Inc., GNPCHA, Nashville Health Care Council	Chamber President; GNPCHA Chair Bruce Evans; sector association presidents	Executive briefing; highlight ROI of ecosystem investment; anchor company partnerships
Entrepreneurship Ecosystem	LaunchTN, Nashville Entrepreneur Center, Jumpstart Foundry, Techstars Music	LaunchTN CEO; Nashville EC President; accelerator program directors	Interactive workshop; co-design action roadmap; identify 1–2 pilot programs
Academic & Research	Vanderbilt University, University of Tennessee, MTSU, Tennessee Tech, ORNL	Vanderbilt Provost; UT System VP for Research; ORNL Partnerships Director	Survey results & analysis; propose co-research agenda
Sustainability	Tennessee Environmental Council, Metro Sustainability Office, WeGo Transit, TDEC	TEC Executive Director; TDEC Commissioner; Metro Sustainability Director	Sustainability index findings + recycling paradox analysis; EPR and composting proposals

Implementation Timeline

Phase	Timing	Activity	Key Milestone
Phase 1	May 2026	Capstone Presentation: Present preliminary findings to Harvard faculty and peers. Finalize methodology and recommendations framework.	Capstone presentation delivered; feedback incorporated
Phase 2	Jun–Aug 2026	Data Expansion: Continue survey distribution targeting N > 200. Close demographic and geographic gaps, particularly for Memphis, Knoxville, and government stakeholders.	N > 200 achieved; sub-regional breakdowns validated
Phase 3	Jun–Jul 2026	Working Sessions: Facilitate up to 2 stakeholder workshops with LaunchTN, Nashville Chamber, and TNECD to co-design an action roadmap and validate quantitative findings.	Action roadmap co-designed; policy briefs drafted
Phase 4	Q3 2026	Deliver Results: Present full survey analysis, maturity scores, and recommendations to Tennessee state officials, Metro Nashville leadership, and key ecosystem stakeholders.	Final report delivered; stakeholder briefings complete

9. Limitations & Next Steps

Current Limitations

- The current sample of N = 82 is adequate for preliminary analysis but below the N > 200 threshold for statistical significance across demographic subgroups.
- Geographic concentration: 82% of respondents are from the Nashville area. Memphis and rural Tennessee are significantly underrepresented.
- Government stakeholder participation is low (1% of respondents), which may understate government-related ecosystem gaps.
- No longitudinal baseline exists yet; current scores cannot be compared over time until a second round of data collection is completed.
- The perception-reality gap in recycling suggests that self-reported survey data for sustainability may overstate actual practice, warranting triangulation with administrative data sources.

Priority Next Steps

- Expand survey to N > 200 (target completion: August 2026), with intentional outreach to Memphis, rural Tennessee, and state government audiences.
- Conduct 2–3 qualitative stakeholder interviews with TNECD, LaunchTN, and Nashville Chamber leaders to validate and contextualize quantitative findings.
- Benchmark Nashville's index scores against peer cities, using publicly available data from the Driving Regional Innovation framework (Indiana Business Research Center, 2021).

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