

NASHVILLE HEALTH CARE COUNCIL
MEMBER REGIONAL IMPACT AND BUSINESS CONFIDENCE SURVEY 2009

The purposes of this survey are to (A) create a summary profile of Nashville Health Care Council member companies, (B) measure their local, regional, and global impacts, and (C) create a CEO business confidence index similar to the Conference Board's CEO Confidence Survey. Your cooperation to this survey at the CEO or CFO level is greatly appreciated.

Please Note: (1) The Nashville MSA in this study refers to the following 13 counties: Cannon, Cheatham, Davidson, Dickson, Hickman, Macon, Robertson, Rutherford, Smith, Sumner, Trousdale, Williamson, and Wilson counties.
(2) This survey has three (3) parts: (A) Company Profile, (B) Company Operation, and (C) Future Expectations.

EXTREMELY CONFIDENTIAL: Individual responses will not be released.

PART A. COMPANY PROFILE (Please pick one)

A1. Our company in the Nashville MSA is

- a. a branch operation
- b. headquarters
- c. both (if more than two (2) sites)

A2. Ownership: Our company is

- a. privately owned
- b. publicly traded
- c. not for profit
- d. government (including state higher education institutions)

A3. How many sites does your company have in the Nashville MSA?

- a. 1
- b. 2
- c. 3
- d. 4 or more

A4. What is the square footage of space your company occupies in the Nashville MSA (if more than one (1) site, please estimate the total)?

- a. Less than 5,000
- b. 5,001-10,000
- c. 10,001-25,000
- d. 25,001-50,000
- e. 50,001-100,000
- f. 100,001-250,000
- g. More than 250,001

A5. What percent of the square footage estimated in A4 is health care related?

For example, if your business is an information technology services company and has a diverse set of business clients, your health care related square footage may be estimated by using the following ratio:

Health Care Related Square Footage = (Health Care IT Revenues, Business Clients, or Employees) / (Total Revenues, Business Clients, or Employees)

- a. 1%- 15%
- b. 16%-30%
- c. 31%-45%
- d. 46%-60%
- e. 61%-75%
- f. 76%-90%
- g. 90%-100%

PART B. COMPANY OPERATION FOR FY 2008-2009 (or latest year available). Please estimate.

B1. Please estimate the current number of employees (by place of work).

If your business is a branch operation and your headquarter company is located outside the Nashville MSA, please report only your Nashville MSA employment.

<u>Nashville MSA</u> (All Companies)	<u>Tennessee</u> (Headquarters Only)	<u>United States</u> (Headquarters Only)	<u>Global</u> (Headquarters Only)
a. 1-20	a. 1-20	a. 1-20	a. 1-20
b. 21-40	b. 21-40	b. 21-40	b. 21-40
c. 41-60	c. 41-60	c. 41-60	c. 41-60
d. 61-100	d. 61-100	d. 61-100	d. 61-100
e. 101-250	e. 101-250	e. 101-250	e. 101-250
f. 251-500	f. 251-500	f. 251-500	f. 251-500
g. 501-999	g. 501-999	g. 501-999	g. 501-999
h. 1,000-2,499	h. 1,000-2,499	h. 1,000-2,499	h. 1,000-2,499
i. 2,500-4,999	i. 2,500-4,999	i. 2,500-4,999	i. 2,500-4,999
j. 5,000-9,999	j. 5,000-9,999	j. 5,000-9,999	j. 5,000-9,999
k. 10,000 or more	k. 10,000 or more	k. 10,000 or more	k. 10,000 or more

B1a. What percent of your total number of employees is health care related (by place of work)?

For example, if your business is an information technology services company and has a diverse set of business clients, your health care related employees may be estimated by using the following ratio:

Health Care Related Employees = (Health Care IT Revenues, or Business Clients) / (Total Revenues, or Business Clients)

<u>Nashville MSA</u> (All Companies)	<u>Tennessee</u> (Headquarters Only)	<u>United States</u> (Headquarters Only)	<u>Global</u> (Headquarters Only)
a. 1%- 15%	a. 1%- 15%	a. 1%- 15%	a. 1%- 15%
b. 16%-30%	b. 16%-30%	b. 16%-30%	b. 16%-30%
c. 31%-45%	c. 31%-45%	c. 31%-45%	c. 31%-45%
d. 46%-60%	d. 46%-60%	d. 46%-60%	d. 46%-60%
e. 61%-75%	e. 61%-75%	e. 61%-75%	e. 61%-75%
f. 76%-90%	f. 76%-90%	f. 76%-90%	f. 76%-90%
g. 91%-100%	g. 91%-100%	g. 91%-100%	g. 91%-100%

B2. Please estimate total annualized payroll for all operations (by place of work).

If your business is a branch operation and your headquarter company is located outside the Nashville MSA, please report only your Nashville MSA payroll.

<u>Nashville MSA</u> (All Companies)	<u>Tennessee</u> (Headquarters Only)	<u>United States</u> (Headquarters Only)	<u>Global</u> (Headquarters Only)
a. Less than \$1 million	a. Less than \$1 million	a. Less than \$1 million	a. Less than \$1 million
b. \$1.1-\$2 million	b. \$1.1-\$2 million	b. \$1.1-\$2 million	b. \$1.1-\$2 million
c. \$2.1-\$5 million	c. \$2.1-\$5 million	c. \$2.1-\$5 million	c. \$2.1-\$5 million
d. \$5.1-\$10 million	d. \$5.1-\$10 million	d. \$5.1-\$10 million	d. \$5.1-\$10 million
e. \$10.1-\$25 million	e. \$10.1-\$25 million	e. \$10.1-\$25 million	e. \$10.1-\$25 million
f. \$25.1-\$50 million	f. \$25.1-\$50 million	f. \$25.1-\$50 million	f. \$25.1-\$50 million
g. \$50.1-\$100 million	g. \$50.1-\$100 million	g. \$50.1-\$100 million	g. \$50.1-\$100 million
h. \$100.1-\$250 million	h. \$100.1-\$250 million	h. \$100.1-\$250 million	h. \$100.1-\$250 million
i. \$250.1-\$500 million	i. \$250.1-\$500 million	i. \$250.1-\$500 million	i. \$250.1-\$500 million
j. \$500.1-\$1,000 million	j. \$500.1-\$1,000 million	j. \$500.1-\$1,000 million	j. \$500.1-\$1,000 million
k. \$1,000.1 million or more	k. \$1,000.1 million or more	k. \$1,000.1 million or more	k. \$1,000.1 million or more

B2a. What percent of your annualized payroll is for health care related employees (by place of work)?

For example, if your business is an information technology services company and has a diverse set of business clients, your health care related payroll may be estimated by using the following ratio:

Health Care Related Payroll = (Health Care IT Revenues, or Business Clients) / (Total Revenues, or Business Clients)

<u>Nashville MSA</u> (All Companies)	<u>Tennessee</u> (Headquarters Only)	<u>United States</u> (Headquarters Only)	<u>Global</u> (Headquarters Only)
a. 1%- 15%	a. 1%- 15%	a. 1%- 15%	a. 1%- 15%
b. 16%-30%	b. 16%-30%	b. 16%-30%	b. 16%-30%
c. 31%-45%	c. 31%-45%	c. 31%-45%	c. 31%-45%
d. 46%-60%	d. 46%-60%	d. 46%-60%	d. 46%-60%
e. 61%-75%	e. 61%-75%	e. 61%-75%	e. 61%-75%
f. 76%-90%	f. 76%-90%	f. 76%-90%	f. 76%-90%
g. 91%-100%	g. 91%-100%	g. 91%-100%	g. 91%-100%

B3. Please estimate your company's annual gross revenues by site location. If there is more than one site in a location, please include all.

If your business is a branch operation and your headquarter company is located outside the Nashville MSA, please report only your Nashville MSA revenues.

<u>Nashville MSA</u>	<u>Tennessee</u>	<u>United States</u>	<u>Global</u>
(All Companies)	(Headquarters Only)	(Headquarters Only)	(Headquarters Only)
a. Less than \$1 million	a. Less than \$1 million	a. Less than \$1 million	a. Less than \$1 million
b. \$1-\$5 million	b. \$1-\$5 million	b. \$1-\$5 million	b. \$1-\$5 million
c. \$6-\$10 million	c. \$6-\$10 million	c. \$6-\$10 million	c. \$6-\$10 million
d. \$11-\$25 million	d. \$11-\$25 million	d. \$11-\$25 million	d. \$11-\$25 million
e. \$26-\$50 million	e. \$26-\$50 million	e. \$26-\$50 million	e. \$26-\$50 million
f. \$51-\$100 million	f. \$51-\$100 million	f. \$51-\$100 million	f. \$51-\$100 million
g. \$101-\$250 million	g. \$101-\$250 million	g. \$101-\$250 million	g. \$101-\$250 million
h. \$251-\$500 million	h. \$251-\$500 million	h. \$251-\$500 million	h. \$251-\$500 million
i. \$0.501-\$1 billion	i. \$0.501-\$1 billion	i. \$0.501-\$1 billion	i. \$0.501-\$1 billion
j. \$1.1-\$5 billion	j. \$1.1-\$5 billion	j. \$1.1-\$5 billion	j. \$1.1-\$5 billion
k. \$5.1-10 billion	k. \$5.1-10 billion	k. \$5.1-10 billion	k. \$5.1-10 billion
l. \$10.1-\$20 billion	l. \$10.1-\$20 billion	l. \$10.1-\$20 billion	l. \$10.1-\$20 billion
m. More than \$20 billion	m. More than \$20 billion	m. More than \$20 billion	m. More than \$20 billion

B3a. What percent of your company's annual gross revenue is from your health care related operations?

For example, if your business is an information technology services company and has a diverse set of business clients, your health care related gross revenues may be estimated by using the following ratio:

Health Care Related Revenues = (Health Care IT Employees, or Business Clients) / (Total Employees, or Business Clients)

<u>Nashville MSA</u>	<u>Tennessee</u>	<u>United States</u>	<u>Global</u>
a. 1%- 15%	a. 1%- 15%	a. 1%- 15%	a. 1%- 15%
b. 16%-30%	b. 16%-30%	b. 16%-30%	b. 16%-30%
c. 31%-45%	c. 31%-45%	c. 31%-45%	c. 31%-45%
d. 46%-60%	d. 46%-60%	d. 46%-60%	d. 46%-60%
e. 61%-75%	e. 61%-75%	e. 61%-75%	e. 61%-75%
f. 76%-90%	f. 76%-90%	f. 76%-90%	f. 76%-90%
g. 91%-100%	g. 91%-100%	g. 91%-100%	g. 91%-100%

B4. Please estimate your annual health care related research and development (R&D) expenditures for Nashville MSA only. (Please report only "Scientific and Clinical R&D" expenditures.)

- a. \$0
- b. Less than \$100,000
- c. \$0.1-\$0.5 million
- d. \$0.6-\$1 million
- e. \$1.1-\$5 million
- f. \$5.1-\$10 million
- g. \$11-\$25 million
- h. \$26-\$50 million
- i. \$51-\$100 million
- j. \$101-\$500 million
- k. More than \$500 million

PART C. FUTURE EXPECTATIONS (CEO CONFIDENCE SURVEY)**C1. Compared to 12 months ago, how would you evaluate general current economic conditions ?****In the U.S.**

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

In the Nashville MSA

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

C1a. Compared to 12 months ago, how would you evaluate current conditions in the health care industry ?**In the U.S.**

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

In the Nashville MSA

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

C1b. Compared to 12 months ago, how would you evaluate current conditions in your company ?

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

C2. Looking forward to 12 months from now, what is your expectation for**the U.S. economy?**

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

the Nashville MSA economy?

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

C2a. Looking forward to 12 months from now, what is your expectation for the health care industry**in the U.S.?**

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

in the Nashville MSA?

- a. substantially better
- b. moderately better
- c. same
- d. moderately worse
- e. substantially worse

C3. Looking forward to 12 months from now, do you expect the number of your employees in the Nashville MSA to

- a. decrease?
- b. remain the same?
- c. increase?

C4. What are your firm's profit expectations from health care related operations in the Nashville MSA for the next 12 months?

- a. increase substantially
- b. increase moderately
- c. remain the same
- d. decrease

C5. If you expect your profits from health care related operations to increase, what would be the primary reason?

- a. market/demand growth
- b. cost reduction
- c. price increase
- d. new technology

C6. What is your biggest business concern over the next year? (please pick one)

- a. access to capital
- b. labor unions
- c. cost of IT
- d. health care reform
- e. availability of health care professionals
- f. increased uninsured patient population

C7. Over the next year, do you see your organization (please pick one)

- a. acquiring?
- b. growing organically and by same-store sales?
- c. focused on operations?
- d. constricting and selling off assets?

C8. If investing in or entering the health care business today, what sector do you believe to be the most profitable?

- a. health care IT
- b. managed care
- c. health care services
- d. long-term care
- e. pharmaceuticals/ bio-tech

C9. How important is it to your business to be located in Nashville?

- a. very important
- b. important
- c. not important