A professional motion picture camera is the central focus, positioned on a film set. The camera's monitor displays a scene of a man in a blue shirt walking away from the camera towards a bright doorway. The background is a blurred interior space with a large window. The camera is equipped with various attachments, including a microphone boom and a lens. The overall scene is dimly lit, with the primary light source coming from the doorway in the background.

**ECONOMIC IMPACT OF THE
MOTION PICTURE PRODUCTION
INDUSTRY IN TENNESSEE**



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Impacts of the Production Industry in Tennessee

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Impacts of the Production Industry in Tennessee

The production industry continues to play a key role in the Tennessee economy. Production projects employ thousands of Tennessee workers paying wages above the state average wage. These projects generate millions of dollars of spending in the state's economy while creating new incomes, infrastructure growth, and increasing tax revenue. Over the last nine years, production projects purchased \$91.3 million in goods and services from approximately 6,500 Tennessee vendors. In addition to the economic and fiscal impacts to Tennessee, projects like *Nashville, Still the King* and *Million Dollar Quartet* promote Tennessee internationally, while generating increased tourism spending for the state. The Center for Economic Research in Tennessee (CERT) analyzed recent motion picture production projects that received funding from the Tennessee Entertainment Commission (TEC) to estimate the economic and fiscal impacts these projects had on the state. In addition, CERT completed an overview of the production industry in Tennessee, which includes industry establishments, employment, wages, and higher education completions.

Highlights

- An estimated **\$228.3 million** in new incomes for Tennessee workers were generated from 50 incentivized production projects.
- The projects created **over 4,000 new full-time equivalent Tennessee jobs** while generating **\$370.8 million** in economic output for the state.
- In addition, the Tennessee Entertainment Commission (TEC) has supported **over two-hundred production projects per year** with non-incentivized assistance. These production activities have supported the creation of 589 Tennessee jobs and **\$34.7 million** in new incomes for Tennessee workers.
- Overnight visitors to Tennessee where the show *Nashville* was a motivating factor spend approximately **\$157.8 million** in the state each year.
- From 2010 to 2016, Tennessee employment in motion picture and video production grew **12%**, with average industry wages **21.3%** above the average wage for all industries.
- Tennessee ranks **No. 7** among all states in the nation for employment in the motion picture production industry cluster; and the sector supports increased economic activity in music and other Tennessee industries.

Economic Impact of Incentivized Production Projects

From 2007 to 2015, the TEC actualized reimbursements or rebated Qualified Tennessee Spend to 50 production projects across Tennessee. These projects operated in the state for 7,346 total production days over the course of the analyzed time period, which includes pre-production, production and post-production operations.

2007 - 2015 Projects Production Days	
Pre-Production	1,955 days
Production	1,845 days
Post-Production	3,546 days
Total Tennessee Production Days	7,346 days

CERT conducted an analysis of these projects to estimate the anticipated economic and fiscal impacts the production projects will have on the state. This includes anticipated growth in jobs and income for Tennessee residents, growth in economic output for the Tennessee economy; as well as fiscal impacts for state and local tax revenues. Each year TEC provides assistance to a variety of other production projects that have an impact on the state's economy. TEC's support for these non-incentivized production projects includes location assistance, permitting and other support. However, for this analysis only the 50 production projects receiving funding from TEC from 2007 to 2015 were included in this analysis.

2007 - 2015 Production Projects			
	Direct Impacts	Indirect and Induced Impacts	Total Impacts
New Tennessee Jobs ¹	2,017	2,023	4,040
New Incomes	\$112.5 million	\$115.8 million	\$228.3 million
Economic Output	\$203.9 million	\$166.9 million	\$370.8 million

¹ Full-time equivalent jobs. To calculate the number of jobs created from these projects, CERT and Impact DataSource calculated the equivalent annualized jobs based on Tennessee payroll and the industry's average wage in the state.

Impacts of the Production Industry in Tennessee

The 50 production projects included in the analysis are estimated to have created 4,040 new jobs for Tennessee residents. This includes 2,017 full-time equivalent jobs created directly through the analyzed production projects, which includes Tennessee cast and crew. An additional 2,023 induced and indirect jobs were created in the regional economy in support of the production activities. This activity indirectly impacts the supplier or vendor network through business-to-business spending. From 2007 to 2015, the productions purchased \$91.4 million in goods and services from approximately 6,500 Tennessee vendors. The direct and indirect economic impacts induce additional economic activity, supported by workers re-spending parts of their salaries in the state.

The new jobs created from the incentivized production projects, and their supporting and spinoff economic activity, are projected to have generated \$228.3 million in new income for Tennessee workers. The 2,017 direct jobs created by the projects resulted in \$112.5 million in new income. The 2,023 indirect and induced jobs are estimated to have created \$115.8 million in new income.

The 50 production projects analyzed are estimated to have generated \$370.8 million in economic output for the state of Tennessee. For every \$1 in new economic output the projects create, the state will realize approximately \$0.82 in additional output. Economic output is the value of goods and services produced in the state as a result of the project. Economic output can be thought of as the new revenue generated by the direct business and spin-off businesses. These projects will result in new job creation, infrastructure growth, and other economic activity across many sectors of the economy, including arts, entertainment and recreation; the information sector; retail trade, and health care and social assistance.

In addition, CERT estimates various taxable sales and purchases from these projects in the State of Tennessee to total approximately \$123 million. The estimated taxable sales and purchase includes the \$91.3 million purchased from Tennessee vendors. Taxable sales and purchases also include activity associated with worker spending in the community. The projects are estimated to have generated \$31.6 million in worker spending in Tennessee on food and other items. Vendor spending in Tennessee accounts for 74% of all taxable sales and purchases made in the state as a result of these projects, with worker spending on food and other items accounting for the remaining 26%. CERT estimates that \$11.1 million in sales tax revenue was generated from these taxable sales and purchases in Tennessee. This includes a projected \$8.3 million in state sales tax collections and \$2.8 million in local sales tax collections.

Economic Impact of Non-Incentivized Production Projects

In addition to supporting production projects through incentives, TEC assists hundreds of other production projects across Tennessee each year. Projects that do not qualify for production incentives may still receive location, permitting and other assistance from the state. TEC began collecting data on these projects in 2014 with estimates of local hires, spending in the state, and the number of production days. From Q1 2014 to Q2 2016, TEC assisted 625 production projects across Tennessee. CERT conducted an analysis of these projects to estimate the anticipated economic and fiscal impacts these production projects will have on the state using some assumptions from the state's incentivized production projects. These assumptions include the percentage of Tennessee payroll and vendor spend relative to the overall Tennessee production spend.

Q1 2014 - Q2 2016 Non-Incentivized Production Projects			
	Direct Impacts	Indirect and Induced Impacts	Total Impacts
New Tennessee Jobs ²	294	295	589
New Incomes	\$17,115,351	\$17,613,407	\$34,728,758
Economic Output	\$31,017,308	\$25,396,972	\$56,414,280

² Full-time equivalent jobs. To calculate the number of jobs created from these projects, CERT and Impact DataSource calculated the equivalent annualized jobs based on Tennessee payroll and the industry's average wage in the state.

The non-incentivized production projects included in the analysis are estimated to have created 589 jobs for Tennessee residents. This includes 294 Tennessee full-time equivalent jobs created directly through the analyzed production projects.³ An additional 295 induced and indirect jobs were created in the regional economy in support of the motion picture production activities. The new jobs created from these production projects are estimated to have generated \$34.7 million in new income for Tennessee workers. Total new income created from these projects includes \$17.1 million from the direct job creation and \$17.6 million from the indirect and induced jobs.

The 625 non-incentivized production projects included in this analysis are estimated to have generated \$56.4 million in economic output for the State of Tennessee.⁴ In addition, CERT estimates various taxable sales and purchases from these projects to total approximately \$18.6 million in the state. This includes production purchases of \$13.9 million in goods and services from Tennessee vendors between January 2014 and June 2016. CERT estimates that taxable sales and purchases related to the non-incentivized production projects generated \$1.267 million in sales tax revenue.

Tourism Impact from Production Industry in Tennessee

Many projects produced in Tennessee promote the state across the world, helping to generate interest and tourism spending in the state. An example of this type of impact is the television show *Nashville*, which is shown in 83 countries around the globe. A 2014 survey by the Nashville Convention and Visitors Corporation interviewed 426 overnight visitors to the city. The survey found that 18% of overnight visitors who were viewers of the *Nashville* indicated that the show was their motivating factor to visit Nashville. In addition, 1 in 10 of surveyed visitors who were viewers of the show mentioned that it was also a motivating factor to visit other areas of Tennessee. According to the survey, viewers of the show have a longer length of stay in the city and bring larger groups. In addition, these overnight visitors spend \$44 more per person per day than those who have not seen the show. They are also more likely to visit the city and the state again in the next two years.

Utilizing the results of this survey, CERT projects that all overnight visitors to Tennessee where the show was a motivating factor spend approximately \$157.8 million in the state each year, generating \$11.0 million in state sales tax collections. The ratings have remained constant over the show's first four seasons leading to continued significant impacts on tourism spending in the state. Assuming all factors were to remain constant, tourism from *Nashville* would have generated an estimated \$486.7 million in visitor spending and \$34.0 million in state sales tax revenue over the three years following the show's premiere.⁵ Other Tennessee productions, including the soon to be released *Million Dollar Quartet*, may also have a significant impact on the state by increasing tourism in Tennessee.⁶

³ To calculate the number of jobs created from these projects, CERT and Impact DataSource calculated the equivalent annualized jobs based on Tennessee payroll, hires, and the number of production days.

⁴ Economic output is the value of goods and services produced in the state as a result of the project. Economic output can be thought of as the new revenue generated by the direct business and spin-off businesses.

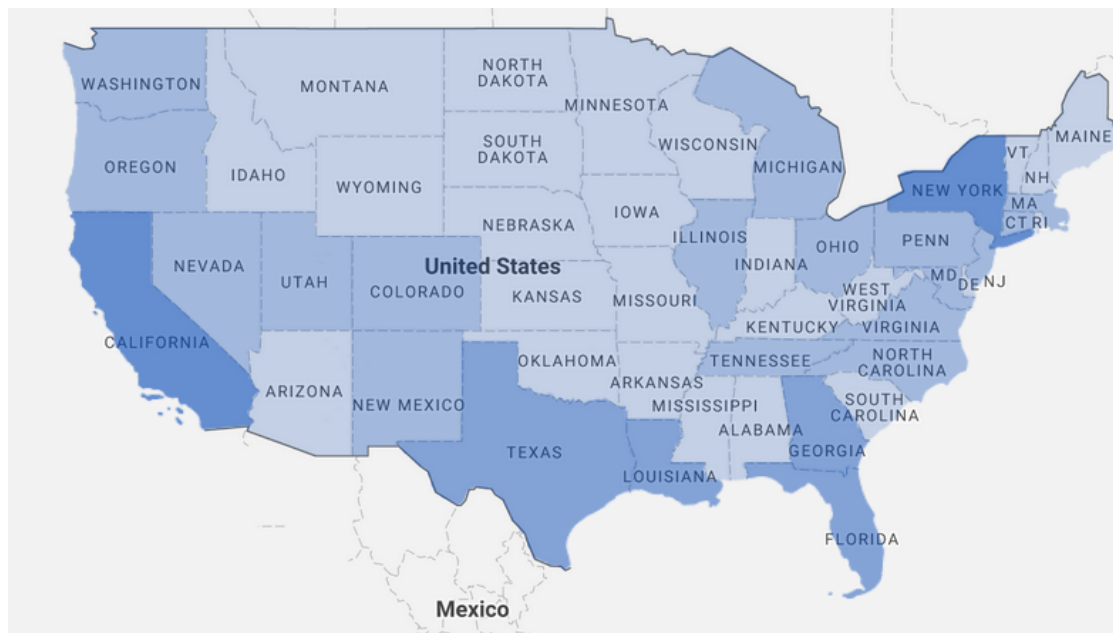
⁵ While it is unrealistic that all factors remained constant in other years; the show's ratings have remained constant, and tourism to Nashville has risen. Because of these reasons, CERT does not find it unrealistic to estimate similar impacts in the last three seasons. The estimated impacts exclude impacts resulting from *Nashville*-generated tourism in future years.

⁶ The nature of tourists' motivational factors in visiting Tennessee is not quantifiable in the absence of surveys. As a result, visitor spending and tax collections cannot be determined for other projects.

Motion Picture and Production Cluster in Tennessee

The production industry in Tennessee plays an important role in the state’s economy. Tennessee employment in the sector has grown significantly over the last decade, with assistance from TEC helping to strengthen the industry by providing financial, permitting, location, and other assistance to this growing cluster. The cluster is comprised of the Motion Picture and Video Production and Distribution industries, as well as the Teleproduction and Other Postproduction industry. Motion Picture and Production cluster employment in Tennessee is approximately 4,395 – a high figure relative to other regions. **Tennessee ranks No. 7** among all states for total employment in this cluster of industries;⁷ and the Nashville Metropolitan Statistical Area (MSA) also ranks No. 7 among 933 MSAs for industry employment.⁸ Tennessee workers employed in the sector earn \$59,796 in annual average wages, which is 27.8% higher than the average wage for all industries in the state. Average annual earnings for Tennessee jobs in the cluster rise to \$72,969 with the inclusion of benefits and other supplements.

Motion Picture and Production Sector Employment, by State (2016)



Motion Picture and Production Sector Employment, by Industry (2016)

Industry (NAICS)	Employment (2016)	Employment Change (2010–2016)	% Employment Change (2010–2016)	Average Annual Total Earnings ⁹	Average Annual Wages	No. Business Locations (2015)
Motion Picture and Video Production (512110)	2,046	221	12%	\$69,288	\$56,779	223
Motion Picture and Video Distribution (512120)	2,149	-29	-1%	\$79,053	\$64,781	7
Teleproduction and Other Postproduction Services (512191)	200	126	170%	\$45,281	\$37,106	22
Total	4,395	318	8%	\$72,969	\$59,796	252

⁷ The top ten states for employment in the motion picture and production cluster of industries are California, New York, Georgia, Louisiana, Texas, Florida, **Tennessee**, New Jersey, Pennsylvania and Connecticut.

⁸ The top ten MSAs for employment in the motion picture and production cluster of industries are (1) Los Angeles-Long Beach-Anaheim, CA; (2) Wilmington, OH; (3) Bridgeport-Stamford-Norwalk, CT; (4) Baton Rouge, LA; (5) New Orleans-Metairie, LA; (6) New York-Newark-Jersey City, NY-NJ-PA; (7) **Nashville-Davidson—Murfreesboro—Franklin, TN**; (8) Missoula, MT; (9) Savannah, GA; and (10) Albuquerque, NM.

⁹ Total earnings includes wages and salaries, plus benefits and other supplements.

Impacts of the Production Industry in Tennessee

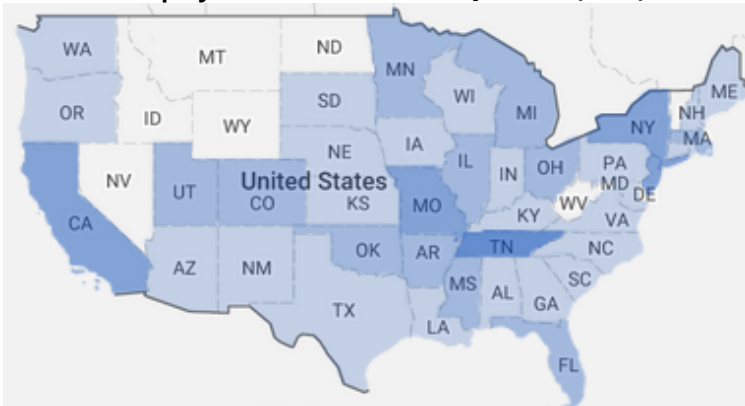
Source: Economic Modeling Specialists Intl. (EMSI)

The motion picture and video production industry is the primary focus of Tennessee's production incentives program. Since the current program was created, this industry has enjoyed significant growth in total employment in the state. From 2010 to 2016, Tennessee employment in motion picture and video production grew 12%, with 2,046 Tennessee workers currently employed in the industry. In addition, over 220 business locations operate in the industry, with average wages 21.3% above the average wage for all industries in Tennessee. Employment growth in this sector is projected to continue over the next decade. Current projections estimate the sector's employment growth over the next decade to continue outpacing overall employment growth in the state. Motion Picture and Video Production is projected to grow 9.3% over the next five years, compared to 4.3% for all industries. In addition, the sector's employment in Tennessee is projected to increase 22.5% by 2026, compared to 9.9% for all industries.

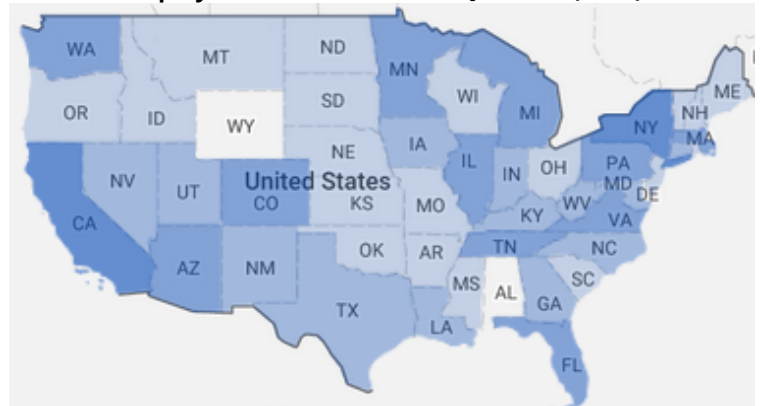
Growth in Tennessee's motion picture and production industry accelerates economic activity in other sectors of the economy through purchases from other industries. During 2014, Tennessee's motion picture and video production industry made purchases totaling \$145.7 million. Of these purchases, 65.2 percent (\$95.0 million) were made in-state, indicative of a robust regional supply chain which causes minimal need for import of goods and services from out-of-state. For example, Tennessee production firms' demand for motion picture distribution totaled \$2.3 million in 2014. 90.8 percent of this demand (\$2.1 million) was satisfied through in-state purchases.¹⁰ Other Tennessee industries supported through purchases of the production industry include motion picture theatres (\$2.78 million in-state purchases); lessors of buildings (\$2.59 million); teleproduction and other postproduction services (\$1.43 million); offices of lawyers (\$1.38 million); agents and managers for artists/athletes/entertainers (\$1.48 million); television broadcasting (\$1.08 million); and promoters of performing arts, entertainment and similar events (\$2.37 million).

Distribution and postproduction activities in Tennessee are also flourishing. Tennessee's concentration of employment in distribution ranks **No. 1** among all states, with industry employment that is 13x the national average. Only California employs more jobs in the distribution industry than Tennessee. Employment concentration reflects an industry's employment in a region relative to total employment in the region. A higher percentage of people employed in an industry leads to a higher level of employment concentration. Additionally, teleproduction and other postproduction services employ 200 jobs across 22 Tennessee establishments. Employment concentration for postproduction activities also leads the nation, with greater concentration quotients in only four states.¹¹

**Motion Picture and Video Distribution,
Employment Concentration Quotient (2016)**



**Teleproduction and Other Postproduction Services,
Employment Concentration Quotient (2016)**



¹⁰ This is a significant share relative to other peer states such as Georgia, where 16.6% of motion picture distribution demand was met in-state, Florida (64.0%), Louisiana (24.4%) and Texas (21.3%).

¹¹ The top five states for employment concentration in the teleproduction and other postproduction services industry are California, New York, Washington, Arizona and **Tennessee**.

Impacts of the Production Industry in Tennessee

Major occupations for this industry in Tennessee include Producers and Directors, Film and Video Editors, Actors, Audio and Video Equipment Technicians, and Laborers and Freight, Stock, and Material Movers. Employment in the industry's major occupations has grown significantly since 2010, indicating an increase in the regional talent pools. Similar to the wage for the industry, many of the top occupations have median wages above the state's median wage for all occupations.

Major Motion Picture and Production Sector Occupations in Tennessee (2016)

Occupation	Employment in Cluster (2016)	Job Growth in Cluster (2010-2016)	Median Hourly Earnings	Employment in All Industries (2016)
Producers and Directors	445	8.9%	\$21.41	1,398
Film and Video Editors	343	14.8%	\$27.93	523
Actors	340	2.7%	\$17.56	748
Audio and Video Equipment Technicians	269	13.6%	\$16.73	2,021
Laborers and Freight, Stock, and Material Movers, Hand	232	9.4%	\$12.24	97,673
Office Clerks, General	189	4.8%	\$13.78	61,408
Camera Operators, Television, Video, and Motion Picture	164	4.8%	\$21.73	348
Entertainers and Performers, Sports and Related Workers, All Other	158	10.5%	\$24.01	576
Media and Communication Workers, All Other	147	13.3%	\$14.64	481
Production, Planning, and Expediting Clerks	125	11.2%	\$22.63	9,156
Multimedia Artists and Animators	111	-0.5%	\$22.52	276
Media and Communication Equipment Workers, All Other	105	-1.1%	\$29.25	330
General and Operations Managers	99	9.7%	\$40.48	48,725
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	78	7.3%	\$14.36	63,352
Sound Engineering Technicians	70	3.9%	\$24.87	624
Bookkeeping, Accounting, and Auditing Clerks	62	2%	\$16.56	34,659
Graphic Designers	57	10%	\$19.63	3,379
Accountants and Auditors	55	6%	\$28.62	19,056
Business Operations Specialists, All Other	47	4%	\$26.94	12,011
First-Line Supervisors of Office and Administrative Support Workers	46	7%	\$22.85	33,803
Set and Exhibit Designers	45	2%	\$23.70	164
Editors	44	5%	\$21.84	1,194

Source: Economic Modeling Specialists Intl. (EMSI)

As employment opportunities have increased in Tennessee's production industry, enrollment of Tennessee students has also increased in several relevant entertainment programs at the state's higher education institutions. Major programs include Acting, Drama and Dramatics/Theatre Arts, Dramatic/Theatre Arts and Stagecraft, Cinematography and Film/Video Production, Graphic Design, and Recording Arts Technology/Technicians. In 2015, Tennessee institutions awarded 1,102 certificates and degrees in the relevant production programs listed below. Institutions offering programs relevant to the industry include Belmont University (Nashville), East Tennessee State University (Johnson City), Middle Tennessee State University (Murfreesboro), Chattanooga State Community College, and Pellissippi State Community College (Knoxville). Belmont University, which has a motion pictures and media studies program, recently established the nation's first College of Entertainment and Music Business.

Relevant Program Completions at Tennessee Higher Education Institutions (2015)

Program	Completions (2015)
Recording Arts Technology/Technician	157
Drama and Dramatics/Theatre Arts, General	136
Commercial and Advertising Art	122
Web Page, Digital/Multimedia and Information Resources Design	101
Graphic Design	89
Communications Technology/Technician	75
Cinematography and Film/Video Production	75
Acting	69
Animation, Interactive Technology, Video Graphics and Special Effects	67
Design and Visual Communications, General	51
Digital Communication and Media/Multimedia	45
Photographic and Film/Video Technology/Technician and Assistant	36
Intermedia/Multimedia	30
Dramatic/Theatre Arts and Stagecraft, Other	14
Film/Cinema/Video Studies	14
Music Technology	11
Directing and Theatrical Production	10

Source: Economic Modeling Specialists Intl. (EMSI)

Synergy of Music and Film/Television

The music and production industry make a dynamic combination in the state. As motion pictures and television shows produced in Tennessee are distributed worldwide, so is the state's music. This is shown, not only from *Nashville*, but also through the creation and distribution of original content from CMT, including *Million Dollar Quartet*, *Still the King* and many others.

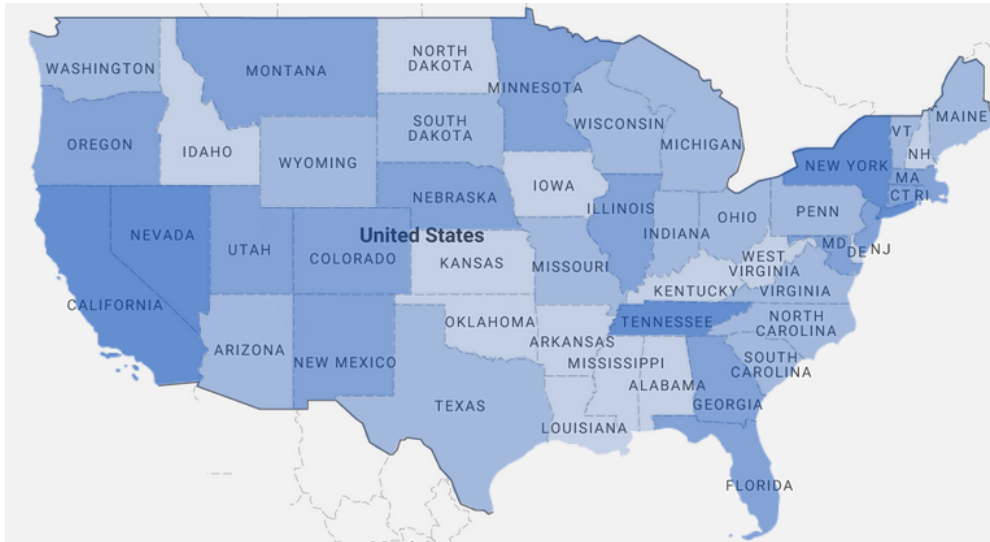
Tennessee's music cluster is defined by the industries provided in the table below. The music cluster comprises 6,725 Tennessee jobs with approximately 1,088 business locations across the state. Tennessee's employment concentration in the music cluster relative to total workforce size ranks **No. 1** in the nation and is more than 3x the national average. Only California and New York have more employees in this cluster of industries than Tennessee. For all seven of Tennessee's music cluster industries, the state ranks among the top 10 states nationally for total employment and for employment concentration quotient. This includes the following rankings:

- **No. 1** for employment and for workforce concentration in music publishing
- **No. 1** for workforce concentration and **No. 2** for total employment in record production
- **No. 2** for workforce concentration and **No. 3** for statewide employment in integrated record production/distribution
- **No. 2** for workforce concentration and **No. 3** for employment in the musical groups and artists industry

Employment in the cluster has grown 19% since 2010, and is projected to grow 5% over the next decade. Each industry of the music sector has wages higher than the state's average wage, with the overall industry wage more than \$126,000.

Impacts of the Production Industry in Tennessee

Music Cluster, Employment Concentration Quotient



Tennessee's Music Cluster (2016)

Industry (NAICS)	Employment (2016)	Employment Concentration Quotient (2016)	Employment Change (2010-2016)	% Employment Change (2010 - 2016)	Average Annual Earnings ¹²	Average Annual Wages	No. Business Locations (2015)
Record Production (512210)	431	9.95	146	51%	\$135,602	\$111,121	60
Integrated Record Production/ Distribution (512220)	498	6.88	76	18%	\$102,205	\$83,754	28
Music Publishers (512230)	1,272	15.06	279	28%	\$91,815	\$75,239	129
Sound Recording Studios (512240)	136	1.44	-60	-31%	\$58,047	\$47,568	69
Other Sound Recording Industries (512290)	59	1.31	-14	-19%	\$66,724	\$54,678	11
Musical groups and artists (711130)	2,671	3.71	184	7%	\$193,879	\$172,337	371
Independent Artists, Writers, and Performers (711510)	1,659	1.46	457	38%	\$134,588	\$119,635	420
Total	6,725	3.06	1,068	19%	\$145,564	\$126,935	1,088

Source: Economic Modeling Specialists Intl. (EMSI)

The state's strong music cluster creates a concentrated supply chain for production projects to access. Music-related demand from Tennessee's production industry is satisfied through purchases from Tennessee's music sector. The production industry's demand for music industries, and the share of purchases which are met in-state, are reflected in the table below. For example, Tennessee's production industry demand for independent artists, writers and performers totaled \$13.6 million in 2014 (9.3 percent of the industry's total supplier needs). Tennessee firms satisfied 86.5 percent (\$11.8 million) of this demand. Additionally, Tennessee's production industry demand for music publishers totaled \$608,800 in 2014; 98.9 percent of this demand was met through purchases from Tennessee's music publishing industry.

TEC data shows that the 50 incentivized production projects alone have spent more than **\$8.5 million** on music created in Tennessee since 2007. The spending only helps to strengthen the state's robust music industry; and in turn concentration of the music industry supports growth of the Tennessee entertainment sector.

¹² Including benefits and other supplements.

Tennessee Motion Picture Production Purchases from Music-Related Industries (2014)

NAICS	Purchases from:	In-region	% In-region	Total Purchases
711510	Independent Artists, Writers, and Performers	\$11,781,398	86.5%	\$13,620,584
512230	Music Publishers	\$601,991	98.9%	\$608,827
512220	Integrated Record Production/Distribution	\$524,311	87.4%	\$599,852
512240	Sound Recording Studios	\$548,666	92.9%	\$590,349
512210	Record Production	\$322,736	98.7%	\$327,118
512290	Other Sound Recording Industries	\$244,157	85.3%	\$286,130
711130	Musical Groups and Artists	\$44,803	97.3%	\$46,057

Source: Economic Modeling Specialists Intl. (EMSI)

Conclusion

State incentivized production projects help generate new incomes for Tennessee workers, grow infrastructure, increase economic output, and raise state and local sales tax collections. Production projects across the state employ thousands of Tennesseans while generating spending from Tennessee vendors. In addition to spending generated directly from production projects, the productions promote Tennessee globally. This exposure leads to increased tourism and a substantial economic and fiscal impact for the state.

From 2007-2015, TEC provided \$37.74 million in reimbursements or rebates for qualified Tennessee spend to 50 production projects across Tennessee. CERT estimates that the production projects generated taxable sales and purchases in Tennessee, resulting in \$11.1 million in sales tax revenue. This includes a projected \$8.3 million in state sales tax collections and \$2.8 million in local sales tax collections.

In addition, tourism has made a significant impact on the state. CERT estimates that tourism spending from *Nashville* generated \$11.0 million in state sales tax collections in 2014. Assuming a similar impact from tourism in the other two years of the series, *Nashville*-related tourism would have generated \$34 million in sales tax revenues for the State of Tennessee. This figure excludes unidentified tourism impacts related to other productions in Tennessee.

When tourism impacts are combined with the \$8.3 million in state tax revenues generated by the productions, their supplier network and workforce; the 50 incentivized production projects have generated an estimated \$42.3 million in state sales tax collections over the life of the TEC program.