

**TENNESSEE
ENTERTAINMENT
COMMISSION**



2025

IMPACT OF THE CREATIVE ECONOMY IN TENNESSEE



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TENNESSEE ENTERTAINMENT INDUSTRY

Tennessee's entertainment industry is an important part of the state's economy, with an economic impact that touches many sectors and provides thousands of Tennesseans with high-quality jobs. Investment from this industry creates new incomes, increases infrastructure growth, and generates additional tax revenues for state and local governments.

In 2024, the entertainment production and music industry clusters generated an estimated \$8.2 billion in gross state product¹ and over \$3.7 billion in new earnings² for Tennessee workers. These span a broad range of sectors, including motion picture and sound recording, broadcasting, interactive digital media, and music publishing.

Tennessee's pro-business environment and talented workforce have encouraged worldwide entertainment brands including, William Morris Endeavor, Sony, Paramount, Warner Bros. Discovery, Inc., Gibson Guitars, and Live Nation to locate significant operations in the state. In recent years, Tennessee has also benefited from the growth of local production entities like Kingdom Story Company, Evolve Studios, Riverside Entertainment, Third Coast Film, Shining Isle Production, Hideout Pictures, and Bentkey.

In addition to content creation, there has been investment in entertainment production infrastructure, providing state-of-the-art production rental services, studio/stages, and post-production facilities. The Tennessee Entertainment Commission (TEC) helps support the economic development and growth of the creative economy through advancing infrastructure, workforce development, and content creation across the state.

Beyond its economic and fiscal impact, the entertainment industry remains a strategic asset for marketing Tennessee to national and international audiences. The Center for Economic Research in Tennessee (CERT) analyzed entertainment industry projects that received funding or assistance from the TEC to estimate the economic and fiscal impacts on the state. CERT also conducted an overview of Tennessee's broader entertainment industry, including establishments, employment, and wages.

¹ Gross state product measures the final market value of all goods and services produced in a region. This figure is the sum of earnings, property income, and taxes on production.

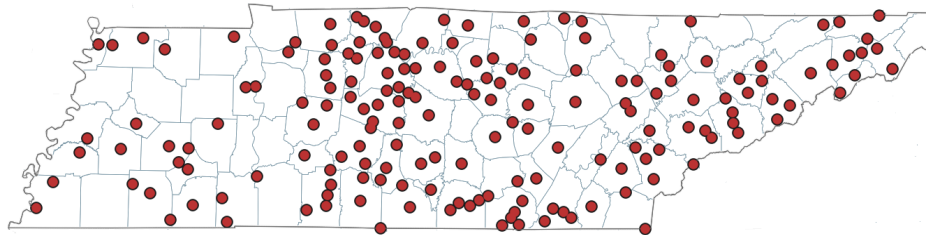
² Total industry earnings for the state, including wages, salaries, supplements, and proprietor earnings.



HIGHLIGHTS

- Since 2007, an estimated **\$833.9M** in new income for Tennessee workers was generated from **133** incentivized production projects.
- The projects created **13,083** new full-time equivalent Tennessee jobs while generating **\$1.2B** in economic output for the state.
- Since 2007, TEC-assisted incentivized production projects purchased **\$287.8M** in goods and services from approximately **14,400** Tennessee vendors.
- Since 2014, the TEC has supported over **2,100** production projects with non-incentivized assistance. These production activities have supported the creation of **1,591** Tennessee jobs and **\$102M+** in new income for Tennessee workers.
- Since 2014, both incentivized and non-incentivized productions supported by the TEC have operated in the state for more than **25,500** production days.
- From 2014 to 2024, Tennessee employment in the entertainment production industry grew **11%**.
- Tennessee ranks **No. 5** among all states in the nation for employment in the entertainment production industry cluster, and the sector supports increased economic activity in music and other Tennessee industries.
- Tennessee's employment concentration in the music industry cluster ranks **No. 1** in the nation and is more than double the national average.
- Tennesseans employed in the music industry cluster have grown **31%** over the last five years.

Since 2014, the TEC has assisted over 2,200 entertainment-based projects. The map represents cities in Tennessee that have provided a location to a TEC-assisted production project over the last decade.



TENNESSEE ENTERTAINMENT COMMISSION

The TEC strives to increase high-quality job opportunities for Tennessee's creative and technology class through the promotion and implementation of programmatic initiatives that reinforce the state as a relevant market for the production and development of multimedia entertainment properties. The TEC's key activities include:

- Manage and administer the state's Film/TV Incentive Grant and Franchise and Excise Tax Credit Program
- Manage a statewide workforce, production services, and creative talent directory
- Operate and manage a statewide locations database
- Manage and administer a statewide sponsorship program
- Coordinate permits for productions utilizing state properties
- Intergovernmental and community liaison services
- Identify and recruit entertainment properties to the state
- Advance locally developed entertainment properties
- Develop and implement campaigns promoting the state's entertainment sector

ECONOMIC IMPACT OF INCENTIVIZED PRODUCTION PROJECTS

As of December 31, 2024, the TEC has actualized reimbursements or rebated Qualified Tennessee Spend to 133 production projects across Tennessee since 2007. These projects operated in the state for 16,900 total production days over the course of the analyzed time period, which includes pre-production, production, and post-production operations.

2007-2024³ Projects Production Days

Pre-Production	4,143
Production	4,850
Post-Production	7,946
Total Tennessee Production Days	16,939

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, the TEC provides assistance to a variety of other production projects that have an impact on the state’s economy. The TEC’s support for these non-incentivized production projects includes location assistance, permitting, and other support. However, for this portion of the analysis, CERT included only the 133 production projects that have received reimbursements or rebates for qualified Tennessee spend from the TEC.

2007-2024¹ Production Projects

	Direct Impacts	Indirect and Induced Impacts	Total Impacts
New Tennessee Jobs ⁴	6,164	6,918	13,083
New Incomes	\$377M+	\$456M+	\$833M+
Economic Output	\$673M+	\$551M+	\$1.2B+

The 133 production projects included in the analysis are estimated to have created 13,083 new jobs for Tennessee residents. This includes 6,164 full-time equivalent jobs created directly through the analyzed production projects. An additional 6,918 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 2024, the productions purchased \$287.8 million in goods and services from approximately 14,400 Tennessee vendors (See Appendix A). The direct and indirect economic impacts induce additional economic activity, supported by workers re-spending parts of their salaries in the state.

³ Projects as of December 31, 2024
⁴ 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 new jobs created by the incentivized production projects — along with their supporting and spinoff economic activity — are projected to have generated \$833.9 million in new income for Tennessee workers. The 6,164 direct jobs resulted in \$377.1 million in new income, while the 6,918 indirect and induced jobs are estimated to have created \$456.8 million.

The 133 production projects analyzed are estimated to have generated \$1.2 billion 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 projects. It 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, additional wages, and other economic activity across many sectors of the economy, including arts and entertainment, recreation, the information sector, retail trade, and health care and social assistance.

CERT estimates that various taxable sales and purchases from these projects in the State of Tennessee total approximately \$374.4 million. This estimate includes the \$287.8 million in purchases from Tennessee vendors. Taxable sales and purchases also include activity associated with worker spending in the community. The projects are estimated to have generated \$86.6 million in worker spending in Tennessee on food and other items. Vendor spending in Tennessee accounts for 77% 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 23%. CERT estimates that \$28.8 million in sales tax revenue was generated from these taxable sales and purchases in Tennessee. This includes a projected \$21.6 million in state sales tax collections and \$7.2 million in local sales tax collections. Additionally, the assisted production projects help market and promote the state to viewers around the world. Film and television have a powerful impact in generating interest and tourism spending in the state. Visitors help support Tennessee's hospitality, retail, travel, and other sectors of the economy while generating significant state and local sales tax revenues.



ECONOMIC IMPACT OF TEC-ASSISTED (NON-INCENTIVIZED) PRODUCTION PROJECTS

In addition to supporting production projects through incentives, the TEC assists other production projects across Tennessee each year. Projects that do not qualify for production incentives may still receive location, permitting, community liaison, and other assistance from the state. The TEC began collecting data on these projects in 2014 with estimates of local hires, spending in the state, and the number of production days. Since 2014, the TEC has assisted over 2,100 production projects across Tennessee. CERT conducted an analysis of the projects to estimate the anticipated economic and fiscal impacts they will have on the state using 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.

2014-2024⁵ Non-Incentivized Production Projects

	Direct Impacts	Indirect and Induced Impacts	Total Impacts
New Tennessee Jobs ⁶	750	841	1,591
New Incomes	\$46.2M+	\$55.9M+	\$102.1M+
Economic Output	\$86.8M+	\$71.1M+	\$157.9M+

The non-incentivized production projects included in the analysis are estimated to have created 1,591 jobs for Tennessee residents. This includes 750 full-time equivalent jobs created directly through the analyzed production projects.⁷ An additional 841 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 \$102.1 million in new income for Tennessee workers. Total new income created from these projects includes \$46.2 million from the direct job creation and \$55.9 million from the indirect and induced jobs.

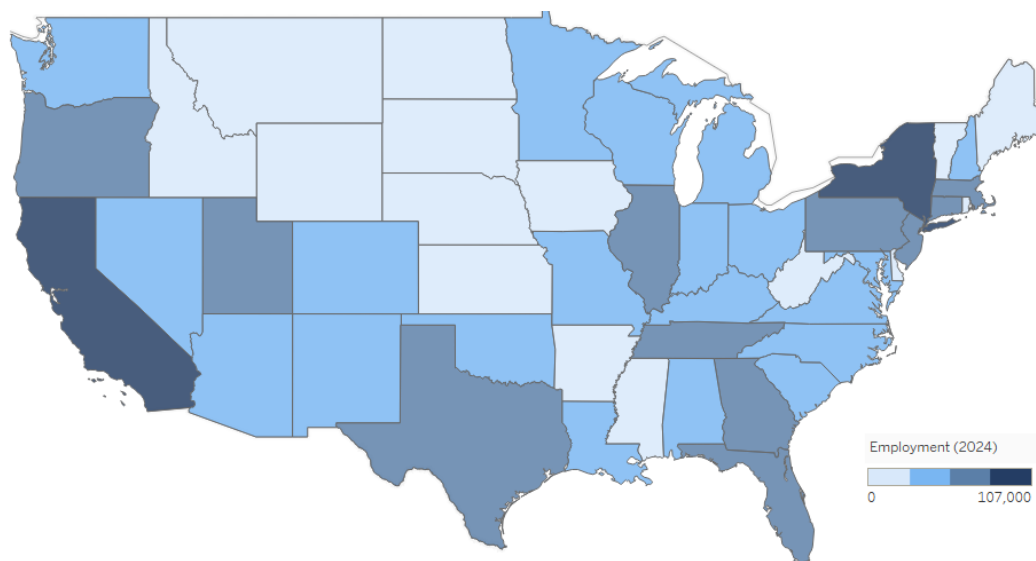
The 2,166 non-incentivized production projects included in this analysis are estimated to have generated \$86.8 million in economic output for the State of Tennessee.⁸ In addition, CERT estimates various taxable sales and purchases from these projects to total approximately \$51.1 million in the state. This includes production purchases of \$40.6 million in goods and services from Tennessee vendors between 2014 and August 31, 2024. Taxable sales and purchases related to the non-incentivized production projects generated \$3.4 million in state sales tax revenue.

⁵ Projects as of August 31, 2024.
⁶ 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.
⁷ 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.
⁸ Economic output is the value of goods and services produced in the state as a result of the projects. Economic output can be thought of as the new revenue generated by the direct businesses and spin-off businesses.

ENTERTAINMENT PRODUCTION CLUSTER IN TENNESSEE

The entertainment production cluster is a valuable contributor to the state's economy, positively impacting multiple sectors. Since 2019, employment in Tennessee's entertainment production cluster has grown by 11%, adding over 600 new jobs. The cluster is comprised of the Motion Picture and Video Production and Distribution industries, as well as the Teleproduction and Other Postproduction Services industry. Tennessee's entertainment production cluster employs 6,160 workers, ranking **No. 5** among all states for total employment.⁹ The Nashville Metropolitan Statistical Area (MSA) ranks **No. 4** among 927 MSAs, with 4,659 residents employed in the entertainment production cluster.¹⁰ Tennessee workers in this cluster earn average annual earnings of \$76,356, which includes salaries, benefits, and other supplements.

Entertainment Production Cluster by Employment, by State (2024)



Industry (NAICS)	Employment (2024)	Employment Change (2019-2024)	% Employment Change (2019-2024)	Average Annual Total Earnings ¹¹	No. Business Locations (2023)
Motion Picture and Video Production (512110)	3,390	-34	-1%	\$73.1K+	463
Motion Picture and Video Distribution (512120)	2,346	403	21%	\$79.1K+	13
Teleproduction and Other Postproduction Services (512191)	423	242	134%	\$86.3K+	70
Total	6,160	613	11%	\$76.3K+	546

Source: Lightcast

⁹ The top 10 states for employment in the motion picture and production cluster of industries are (1) California, (2) New York, (3) Georgia, (4) Florida, (5) **Tennessee**, (6) Texas, (7) Illinois, (8) Utah, (9) New Jersey, and (10) Pennsylvania.

¹⁰ The top 10 MSAs for employment in the motion picture and production cluster of industries are (1) Los Angeles-Long Beach-Anaheim, CA; (2) New York-Newark-Jersey City, NY-NJ-PA; (3) Atlanta-Sandy Springs-Alpharetta, GA; (4) **Nashville-Davidson—Murfreesboro—Franklin, TN**; (5) San Francisco-Oakland-Berkeley, CA; (6) Miami-Fort Lauderdale-Pompano Beach, FL; (7) Salt Lake City, UT; (8) Chicago-Naperville-Elgin, IL-IN-WI; (9) Bridgeport-Stamford-Norwalk, CT; and (10) Washington-Arlington-Alexandria, DC-VA-MD-WV.

¹¹ Earnings include wages and salaries, plus benefits and other supplements.

The motion picture and video production industry is the primary focus of Tennessee's production incentives program and has a significant impact on the state's economy, with more than \$79.1K in benefits. In 2024, the industry generated an estimated \$728 million in gross state product¹² for the state, an increase of 43% over five years. Additionally, it created more than \$353 million in new earnings¹³ for Tennessee workers. Over the last 10 years, this industry has enjoyed significant growth in statewide employment. From 2014 to 2024, Tennessee employment in motion picture and video production grew 126% (1,887 net new jobs). Currently, this industry employs 3,390 Tennesseans, and supports more than 464 business locations, an increase of nearly 70% since 2019. Employment growth in this industry is projected to continue over the next decade. Current estimates show a projected 36% increase in employment, significantly outpacing the 12% growth projected across all industries in Tennessee.

Major Entertainment Production Cluster Occupations in Tennessee (2024)

Major occupations for this cluster in Tennessee include producers and directors; audio and video equipment technicians; camera operators for television, video, and film; film and video editors; laborers and freight, stock, and material movers; as well as various back-office occupations. Many of the top occupations have median wages above the state's overall median wage.

Occupation	Employment in Cluster (2024)	Job Growth in Cluster (2019-2024)	Median Hourly Earnings	Employment in All Industries (2024)
Producers and Directors	533	30%	\$29.31	1,721
General and Operations Managers	299	109%	\$46.99	73,949
Production, Planning, and Expediting Clerks	286	96%	\$22.80	14,170
Audio and Video Technicians	237	4%	\$21.31	1,280
Camera Operators, Television, Video, and Film	216	-26%	\$27.00	448
Film and Video Editors	197	-45%	\$29.43	362
Laborers and Freight, Stock, and Material Movers, Hand	194	-41%	\$17.50	114,398
Actors	162	-52%	\$21.73	813
Editors	162	111%	\$26.24	1,240
Media and Communication Workers, All Other	161	49%	\$30.38	593
Office Clerks, General	132	-43%	\$17.14	55,677

¹² Gross state product measures the final market value of all goods and services produced in a region. This figure is the sum of earnings, property income, and taxes on production.

¹³ Total industry earnings for the state, including wages, salaries, supplements, and proprietor earnings.

Major Entertainment Production Cluster Occupations in Tennessee (2024 Continued)

Occupation	Employment in Cluster (2024)	Job Growth in Cluster (2019-2024)	Median Hourly Earnings	Employment in All Industries (2024)
Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	132	144%	\$39.16	18,045
Accountants and Auditors	131	34%	\$35.09	28,094
Lighting Technicians and Media and Communication Equipment Workers, All Other	93	492%	\$25.80	893
Writers and Authors	81	49%	\$28.28	961
Project Management Specialists and Business Operations Specialists, All Other	75	45%	\$39.02	17,807
Art Directors	74	30%	\$36.88	749
Special Effects Artists and Animators	64	28%	\$33.66	188
First-Line Supervisors of Office and Administrative Support Workers	64	-24%	\$29.72	51,223
Set and Exhibit Designers	62	3%	\$22.10	246
Miscellaneous Entertainers and Performers, Sports and Related Workers	52	54%	\$31.07	329
Heavy and Tractor-Trailer Truck Drivers	50	-22%	\$24.81	62,215

Source: Lightcast



MUSIC INDUSTRY CLUSTER

Multiple genres of music were born in the state with the music industry cluster continuing to significantly impact the state's economy. In 2024, the cluster contributed an estimated \$7 billion in gross state product¹⁴ and generated \$3.1 billion in earnings¹⁵ for Tennessee workers. Tennessee is home to thousands of professional musicians, commercial music offices, and major record labels operations.

The state ranks highly in various categories, including employment, business locations, and job growth. The music and entertainment production clusters are a dynamic combination in the state. As motion pictures and television shows produced in Tennessee are distributed worldwide, so is the state's music.

Tennessee's music industry cluster is defined by the industries provided in the table on the next page. The music cluster comprises over 23,700 jobs, including thousands of self-employed music sector jobs and employees at nearly 1,500 business locations across the state¹⁶. Employment in the cluster has grown 95% since 2014 and is projected to grow another 21% over the next 10 years.

Tennessee ranks No. 1 in the nation for employment concentration in the music industry cluster relative to its total workforce—more than twice the national average. The state also ranks No. 5 in the nation for employment in this cluster.¹⁷ For all six industries that make up Tennessee's music cluster, the state ranks among the top 10 nationally for both total employment and employment concentration. This includes the following rankings:

- **No. 2** for employment and **No. 1** for workforce concentration in music publishing
- **No. 1** for workforce concentration and **No. 3** for total employment in record production and distribution
- **No. 2** for workforce concentration and **No. 5** for employment in the sound recording studios industry
- **No. 1** for workforce concentration and **No. 2** for employment in the musical groups and artists industry
- **No. 2** for workforce concentration and **No. 5** for employment in the sector for other sound recording industries
- **No. 8** for workforce concentration and **No. 6** for employment in the Independent Artists, Writers, and Performers industry sector

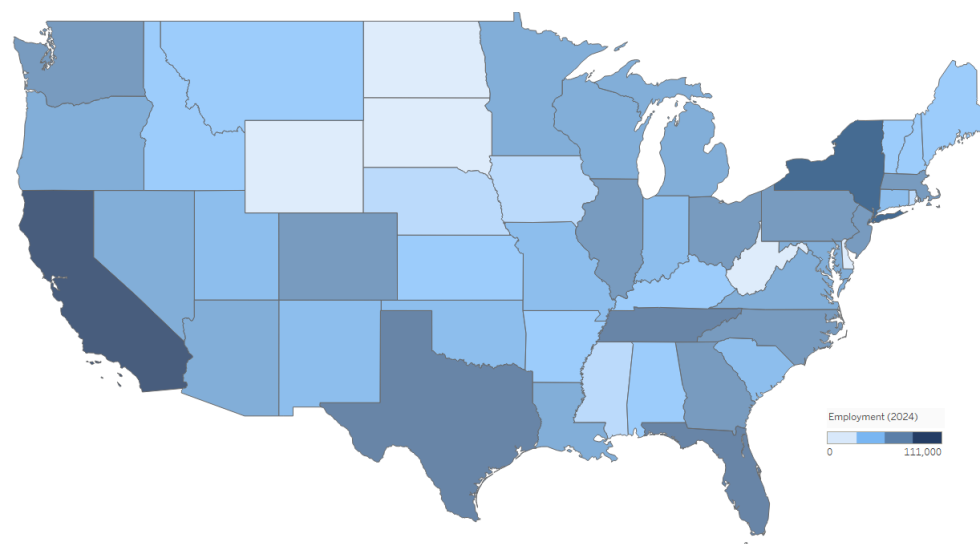
¹⁴ Gross state product measures the final market value of all goods and services produced in a region. This figure is the sum of earnings, property income, and taxes on production.

¹⁵ Total industry earnings for the state, including wages, salaries, supplements, and proprietor earnings.

¹⁶ Employment figures include QCEW Employees and self-employed workers in these sectors.

¹⁷ The top 10 states for employment in music industries are California, New York, Texas, Florida, Tennessee, Pennsylvania, Illinois, Georgia, Washington, and Massachusetts.

Music Industry Cluster, Employment Concentration Quotient (2024)



Tennessee's Music Industry Cluster (2024)¹⁸

Industry (NAICS)	Employment (2024)	Employment Change (2019-2024)	% Employment Change (2019-2024)	Average Annual Earnings ¹⁹	No. Business Locations (2023)
Music Publishers (512230)	2,975	886	42%	\$96,836	175
Sound Recording Studios (512240)	1,105	433	65%	\$49,917	93
Record Production and Distribution (512250)	2,315	701	43%	\$137,326	115
Other Sound Recording Industries (512290)	326	58	22%	\$69,570	28
Musical Groups and Artists (711130)	5,143	197	4%	\$131,759	541
Independent Artists, Writers, and Performers (711510)	11,873	3,545	43%	\$53,455	532
Total	23,737	5,820	32%	\$84,295	1,483

Source: Lightcast

The TEC data shows that the 133 incentivized production projects have spent more than \$13.5 million on music created in Tennessee since 2007. The spending only helps to strengthen the state’s robust music industry and to support the growth of the Tennessee entertainment production industry sector.

The Tennessee Department of Economic and Community Development (TNECD) actively recruits music industry businesses to locate or expand in the state. During Governor Lee’s administration, TNECD projects have committed to create over 900 new jobs within the music industry cluster while investing nearly \$33 million in the state. Major projects include iHeart Media + Entertainment, Inc., Nashville Record Pressing, LLC, and United Record Pressing, LLC. Additionally, the TEC assisted in the location of Rock Nashville just north of downtown Nashville in 2024. The expansive music production campus will include an investment of \$156 million and the creation of 400 new jobs.

¹⁸ Employment figures include QCEW Employees and self-employed workers in these sectors.

¹⁹ Including benefits and other supplements.

HIGHER EDUCATION PROGRAMS AND COMPLETIONS

As employment opportunities have increased in Tennessee's production industry, the number of completions by Tennessee students in several relevant entertainment programs at the state's higher education institutions has also grown in recent years. 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. Over the last five years, Tennessee institutions awarded nearly 10,000 certificates and degrees in the relevant production programs listed in the chart 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's Mike Curb College of Entertainment & Music Business has been named a Top 15 School for Music Business by *Billboard Magazine* and a Top 20 Film School in North America by *Variety Magazine*. *Animation Career Review* ranked Middle Tennessee State University among the top animation and game design schools in the South in their 2024 rankings.

The TEC and State of Tennessee strives to foster an environment where students graduating from creative programs have opportunities for high-quality employment in the state. Additionally, it is vital for the state's economy to provide a talented workforce, which helps attract and retain businesses across the state.

Relevant Program Completions at Tennessee Higher Education Institutions (2018-2022)

Program	Completions (2018-2022)
Music Management	2,391
Recording Arts Technology/Technician	1,733
Cinematography and Film/Video Production	873
Drama and Dramatics/Theatre Arts, General	699
Commercial and Advertising Art	616
Communications Technology/Technician	480
Graphic Design	425
Web Page, Digital/Multimedia and Information Resources Design	409
Acting	368
Animation, Interactive Technology, Video Graphics, and Special Effects	311
Music Technology	283
Digital Communication and Media/Multimedia	262
Design and Visual Communications, General	183
Digital Arts	161
Film/Cinema/Media Studies	145
Photographic and Film/Video Technology/Technician	102
Game and Interactive Media Design	31
Intermedia/Multimedia	26

Source: Lightcast

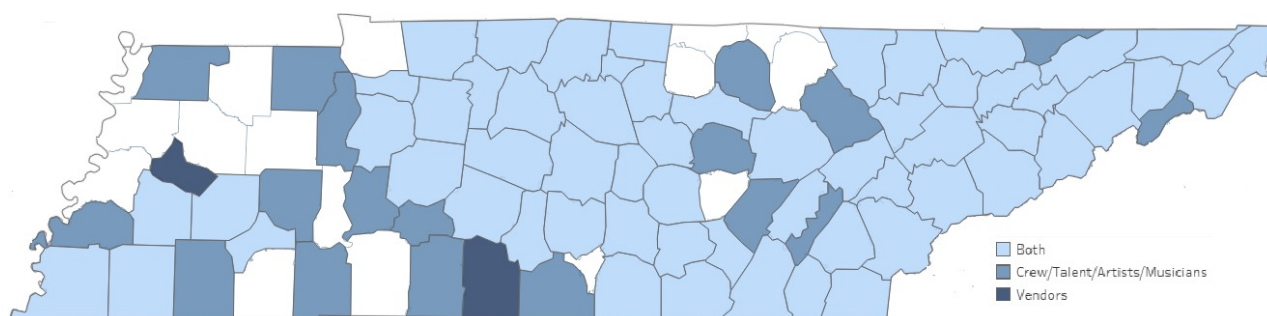
CONCLUSION

The creative economy is a vital part of the state's economic landscape. These industries help generate new incomes for Tennessee workers, grow infrastructure, support small businesses, increase economic output, and raise state and local sales tax collections. In 2024, the entertainment production and music industry clusters generated an estimated \$8.2 billion in gross state product²⁰ for the state and over \$3.7 billion in new earnings²¹ for Tennessee workers. The TEC and state help support the creative economy in a variety of ways including high quality job creation, advancing infrastructure development, promoting state resources, increasing site locations, liaison services, supporting local organizations, and incentivizing statewide entertainment production projects.

Since 2007²², the TEC has supported 133 production projects across Tennessee through reimbursements or rebates for qualified in-state spending. CERT estimates that the production projects generated \$833.9 million in new income for Tennessee workers while purchasing over \$287.8 million in goods and services from thousands of Tennessee vendors. In addition, TEC supports an average of 200 non-incentivized projects each year with permitting, location, and other assistance—further fueling growth in the state's economy. While investing in the state and employing Tennessee workers, the production projects promote Tennessee to a global audience. This exposure leads to increased tourism and a substantial economic and fiscal impact for the state while supporting other sectors of Tennessee's economy.

APPENDIX A

79 of the state's 95 Counties (83%) have Crew, Artists, Talent, Musicians, and/or Vendor Locations supporting the creative economy



Source: TEC Production Directory, SAG-AFTRA Membership Directory, AFM Local 257 and IATSE 492 Database

²⁰ Gross state product measures the final market value of all goods and services produced in a region. This figure is the sum of earnings, property income, and taxes on production.

²¹ Total industry earnings for the state, including wages, salaries, supplements, and proprietor earnings.

²² As of May 31, 2022