

# Economic Impact of the Moving Image Industries in Caldwell & Hays Counties

Fall 2017



Produced for



Prepared by



TXP, Inc.

1310 South 1st Street, Suite 105

Austin, Texas 78704

(512) 328-8300 phone

[www.txp.com](http://www.txp.com)

## Table of Contents

Executive Summary .....	1
Overview .....	2
Economic & Tax Revenue Impact of the Moving Image Industry .....	3
Defining the Moving Image Industry .....	3
TMIIIP Historical Trends within Caldwell & Hays Counties .....	5
Economic Impact Methodology .....	9
Economic Impact of the Moving Image Industry .....	10
Tax Revenue Impact of the Moving Image Industry .....	10
Findings & Conclusion .....	11
Appendix 1 – TMIIIP Projects Produced in Caldwell & Hays Counties .....	12
Appendix 2 – Caldwell County Non-incentivized Projects .....	13
Appendix 3 – Hays County Non-incentivized Projects .....	14
Appendix 4 – Productions filmed on location at Texas State University .....	16
Appendix 5 – Detailed Economic Impact Table .....	17
Legal Disclaimer .....	18



## Executive Summary

The Texas Moving Image Industry Incentive Program (TMIIP) managed by the Texas Film Commission is designed to grow the economy through the moving image industry and create jobs in Texas. TMIIP provides qualifying film, television, commercial, visual effects, and video game productions the opportunity to receive a cash grant based on eligible Texas expenditures.

Over the past 10 years, Caldwell County and Hays County (Study Area) have taken advantage of the TMIIP. Since 2008, over 35 eligible projects have used various locations in the two counties. In addition to TMIIP eligible projects, the Study Area has attracted over 75 non-incentivized projects. This has resulted in millions of dollars being injected into the local economy.

Based on the data provided by the Texas Film Commission, approximately \$13.7 million was spent within the Study Area between 2008 and 2016. This amount includes eligible TMIIP projects, non-incentivized activity, and *The Leftovers, Season 2* (not included in TMIIP data). Between 2008 and 2016, total economic activity attributable to the motion picture, film, and TV productions was \$26.7 million and supported 185 jobs. Caldwell County and Hays County public sector jurisdictions collected approximately \$360,975 in general fund tax revenue between 2008 and 2016 related to the moving image industry activity.

The following key findings emerged as opportunities to focus on to grow the moving image industry sector:

1. The moving image industry offers the opportunity to leverage the unique attributes, local flavor, and scenery of Caldwell County and Hays County.
2. The Study Area could enhance its position with a more aggressive approach to providing local incentives for film and visual media production.
3. The motion picture, film, and TV production sector in the Study Area appears ripe for some type of coop arrangement, where both visiting productions and local filmmakers can rent space (both office and storage) and equipment.
4. Texas State University should examine ways to make it easier for visual media productions to access its resources (ex. Office of Film Management) and expand courses offered related to motion picture, film, and TV productions.
5. The complex, multi-departmental nature of the motion picture, film, and TV production sector's interaction with the different stakeholders warrants an initial focal point of contact for the two-county region.

## Overview

The Texas Moving Image Industry Incentive Program<sup>1</sup> managed by the Texas Film Commission is designed to grow the economy through the moving image industry and create jobs in Texas. TMIIP provides qualifying film, television, commercial, visual effects, and video game productions the opportunity to receive a cash grant based on a percentage of a project's eligible Texas expenditures. Between 2008 and 2016, the Texas moving image industry has generated over \$1.3 billion in statewide spending while creating over 142,974 jobs.

Over the past 10 years, Caldwell County and Hays County (also referred to as Caldwell & Hays Counties in this report) have taken advantage of the TMIIP and other programs. Since 2008, over 35 eligible projects have used locations in the Study Area. The eligible applicants qualified as films, television shows, or commercials. This has resulted in millions of dollars being injected into the local economy. For example, Lockhart served as the fictional town of Jarden, Texas for Season 2 of the HBO TV series *The Leftovers*. In addition to TMIIP eligible projects, Caldwell & Hays Counties have attracted over 75 non-incentivized projects. Award-winning film, *Yakona*<sup>2</sup>, is a documentary based on the waters of the San Marcos River and its headwaters at Spring Lake. The recently released movie, *Tiramisu for Two*, was independently produced over a two-year period in San Marcos.

A number of cities in the region including Buda, Kyle, Lockhart, and San Marcos are certified film friendly communities. Established in 2007, the Film Friendly Texas Program<sup>3</sup> is a certification and marketing program administered by the Texas Film Commission. Film Friendly Texas Certified Communities receive ongoing training and guidance from the Texas Film Commission regarding media industry standards, best practices, and how to effectively accommodate on-location filming activity in their community.

Building upon the past ten years of success, the Greater San Marcos Partnership retained TXP, Inc. to calculate the economic and tax revenue impact of the film, motion picture, and moving picture industry in Caldwell & Hays Counties. Because there is no single definition for film and TV production that applies to all communities, TXP utilized the TMIIP definition and modified it based on actual activities within the two counties. TXP has calculated the impact for both TMIIP eligible productions and non-incentivized projects. As part of this process TXP obtained information from local industry-related stakeholders during focus groups. Based on the economic analysis and information obtained from stakeholders, TXP identified key findings that can guide policies to the competitiveness of the region.

---

<sup>1</sup> <https://gov.texas.gov/film/page/miip>

<sup>2</sup> <http://yakona.org/>

<sup>3</sup> [https://gov.texas.gov/film/page/fftx\\_overview](https://gov.texas.gov/film/page/fftx_overview)

## Economic & Tax Revenue Impact of the Moving Image Industry

The economic impact of the film, motion picture, and moving picture industry in Caldwell & Hays Counties are far-reaching and dynamic. Based on data from the Texas Film Commission, most productions in Central Texas are based out of Austin, but some of these productions do spend a few days taking advantage of shooting locations in Caldwell & Hays Counties. The most direct linkage between movie, commercials, and TV series filming is when a production company rents office and storage space, hires local talent, and spends money at area restaurants and shops. The impacts are not limited to just a few days of filming in the region. Higher education is also an asset the industry leverages directly and indirectly. Over the past 5 years, approximately 20 productions have filmed at Texas State University. The University also offers classes related to film and video production, creating a talent pool for current production activity as well as creating a talent pipeline for the long-term growth of this sector. The following section provides context about the size of the film, motion picture, and moving picture industry in Central Texas, what share the Study Area currently represents, and statistics on TMIIP projects in the region.

### Defining the Moving Image Industry

There is no standard or all-inclusive definition of the motion picture, film, and TV production industry. For the purposes of establishing a baseline for the Austin Metropolitan Statistical Area (Austin MSA) and Caldwell & Hays Counties, TXP focused on two NAICS codes (NAICS 51211 and 51219). This definition differs from the TMIIP in that it does not include video game production nor does it include independent artists, writers, and set designers. TXP excluded these industry sectors from the definition because 1) there was no eligible TMIIP activity in Caldwell or Hays Counties over the past few years, or 2) total employment related to this activity is so small that statistics are not reported by the Texas Workforce Commission. TXP collected data from the Texas Workforce Commission (QCEW dataset) and the Nonemployer Statistics (usually self-employed individuals) from the US Census Bureau. The two NAICS codes used in this report were:

- **51211 Motion Picture and Video Production** – This industry comprises establishments primarily engaged in producing, or producing and distributing motion pictures, videos, television programs, or television commercials.
- **51219 Postproduction Services and Other Motion Picture and Video Industries** – This industry comprises establishments primarily engaged in providing postproduction services and other services to the motion picture industry.

Over the past 10 years, combined employment growth in the Study Area has outperformed the Austin MSA as a whole. However, growth in these two counties' motion picture, film and TV production sector has significantly lagged behind the Austin MSA. The Study Area is 7.6 percent

of total Austin MSA employment but only 1.6 percent of motion picture, film and TV production sector employment. If the two counties were able to capture their “relative share” of all regional motion picture, film and TV production employment, this would result in an additional 124 direct jobs or a total of 169 jobs.

**Table 1: Total Employment in the Austin MSA & Caldwell & Hays Counties**

Year	Austin MSA	Caldwell & Hays Counties	% of Austin SMA
2006	714,308	50,727	7.1%
2007	750,696	53,694	7.2%
2008	764,399	53,570	7.0%
2009	743,584	54,193	7.3%
2010	754,768	55,528	7.4%
2011	782,417	58,011	7.4%
2012	812,603	60,314	7.4%
2013	845,806	63,314	7.5%
2014	881,613	65,964	7.5%
2015	922,922	68,758	7.5%
2016	953,513	72,083	7.6%
Growth Rate	33%	42%	N/A

Source: Texas Workforce Commission, US Census Bureau, TXP

**Table 2: Motion Picture, Film, and TV Production Employment in the Austin MSA and Caldwell & Hays Counties**

Year	Austin MSA	Caldwell & Hays Counties	% of Austin MSA
2006	783	30	3.8%
2007	983	29	3.0%
2008	1,087	31	2.9%
2009	1,099	35	3.2%
2010	1,254	36	2.9%
2011	1,462	33	2.3%
2012	1,635	31	1.9%
2013	2,414	34	1.4%
2014	2,590	37	1.4%
2015	2,773	41	1.5%
2016	2,835	45	1.6%
Growth Rate	262%	50%	N/A

Source: Texas Workforce Commission, US Census Bureau, TXP



### **TMIIP Historical Trends within Caldwell & Hays Counties**

Between 2008 and 2016, the Study Area was home to 35 eligible TMIIP projects. In addition to TMIIP eligible projects, Caldwell & Hays Counties have attracted over 75 non-incentivized projects. The Texas Film Commission collects the total amount spent and the number of locations used for eligible projects. When the Texas Film Commission collects data on eligible TMIIP projects, however, the data is not allocated by where the monies are spent. From 2008 to 2016, total spending into Texas from projects that shot in Caldwell & Hays Counties was \$133.2 million. These projects received nearly \$30.0 million in TMIIP grants.

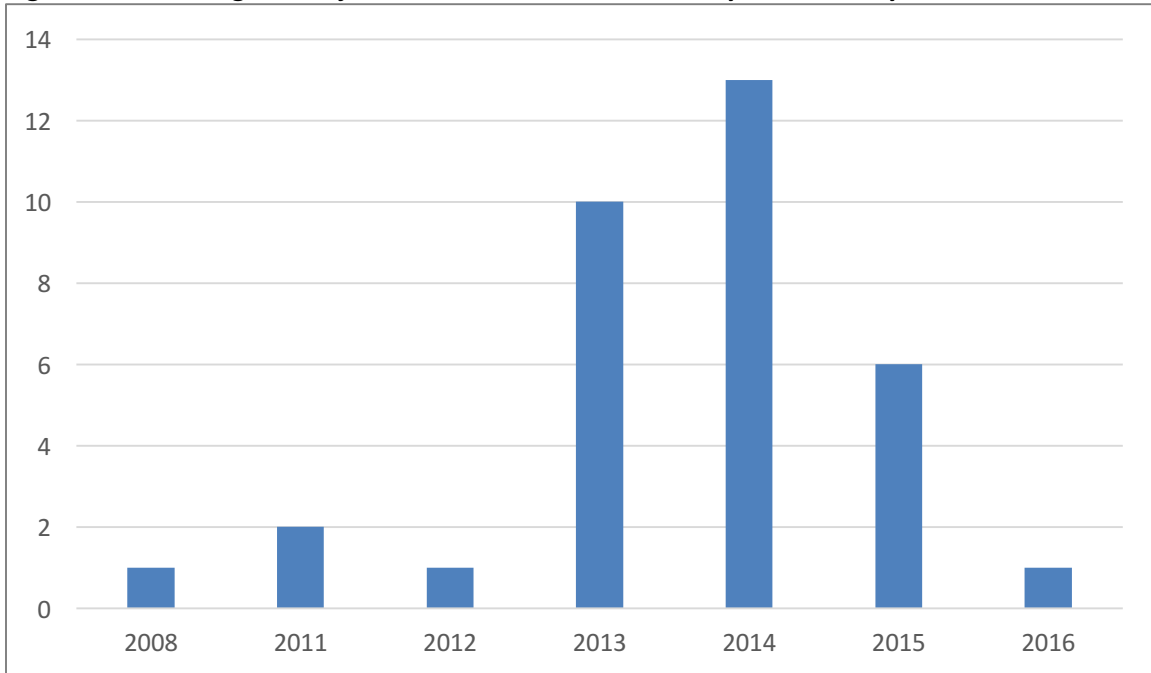
Based on interviews with stakeholders, input from the Texas Film Commission, and confidential information shared on specific productions, TXP estimates that about 5 percent of the total spending occurs within the Study Area. For example, if a movie had \$20.0 million in eligible TMIIP spending and indicated using a shooting location in the Study Area, TXP estimated \$1.0 million was spent locally.

For non-incentivized projects, TXP assumed 10 percent of the total Austin MSA spending occurs within Caldwell & Hays Counties. TXP believes these smaller projects are more likely to spend a larger amount of money in fewer locations. These projects likely did not qualify because 1) the production did not meet the minimum in state spending requirements; 2) limited Texas Film Commission funding over the past few years from which to incentivize projects; or 3) did not meet other major requirements such as 70 percent of paid crew must be Texas residents or shoot at last 60 percent of the project in Texas.

The fluctuations in film, motion picture, and moving picture industry activity are directly linked to the amount of state incentives available. Every two years, the Texas legislature allocates money to the TMIIP and other economic development programs. As depicted in the following figures, Caldwell County and Hays County activity moves in tandem with state funding. The 85<sup>th</sup> Texas Legislature allocated \$22 million in funding for the next two years, down from about \$32 million for the 2015-2016 biennium.

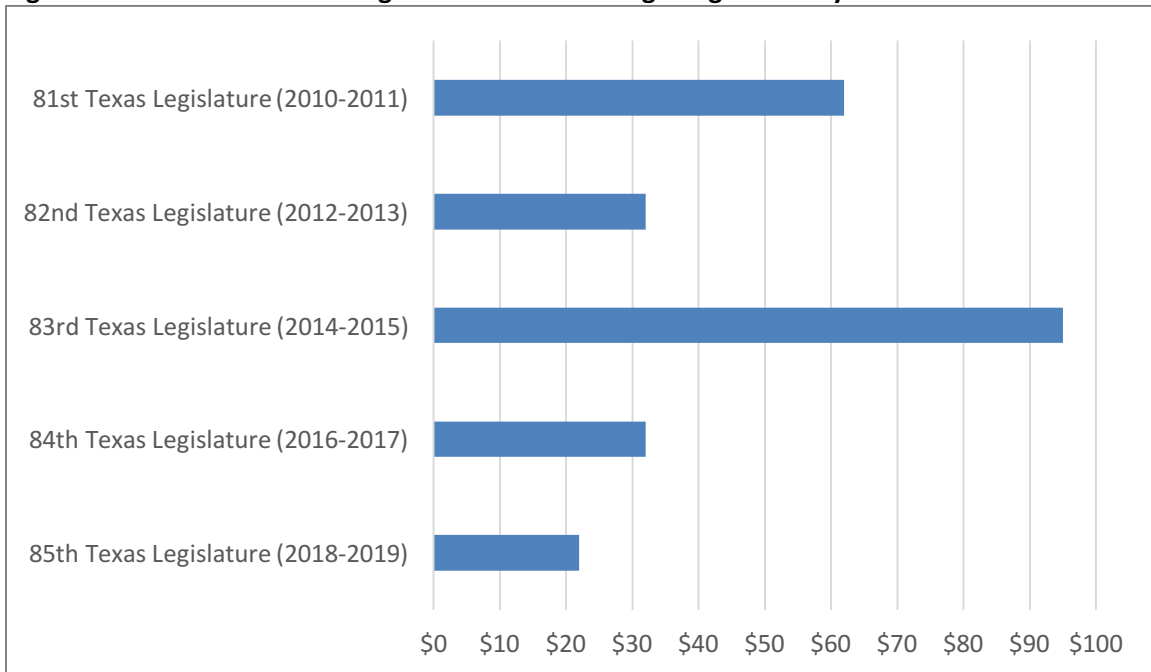
TXP also conducted interviews and focus group meetings with stakeholders related to Caldwell & Hays Counties motion picture, film, and TV production sector. Participants included film makers, higher education representatives, production coordinators, and public sector representatives. The general consensus was that a small number of Study Area residents work fulltime in the moving image industry. Because the amount of state incentives varies each legislative session, the focus should be on creating a self-sustaining grassroots industry – even if this building process is slower. A major theme that emerged was Caldwell & Hays Counties might be best served by focusing on smaller TV productions, commercials, and related activities (ex. corporate training videos). Yes, the region should actively recruit larger TV productions and movies, but this does have a boom and bust cycle.

**Figure 1: TMIIP Eligible Projects Produced in Caldwell & Hays Counties by Year**



Source: Texas Film Commission

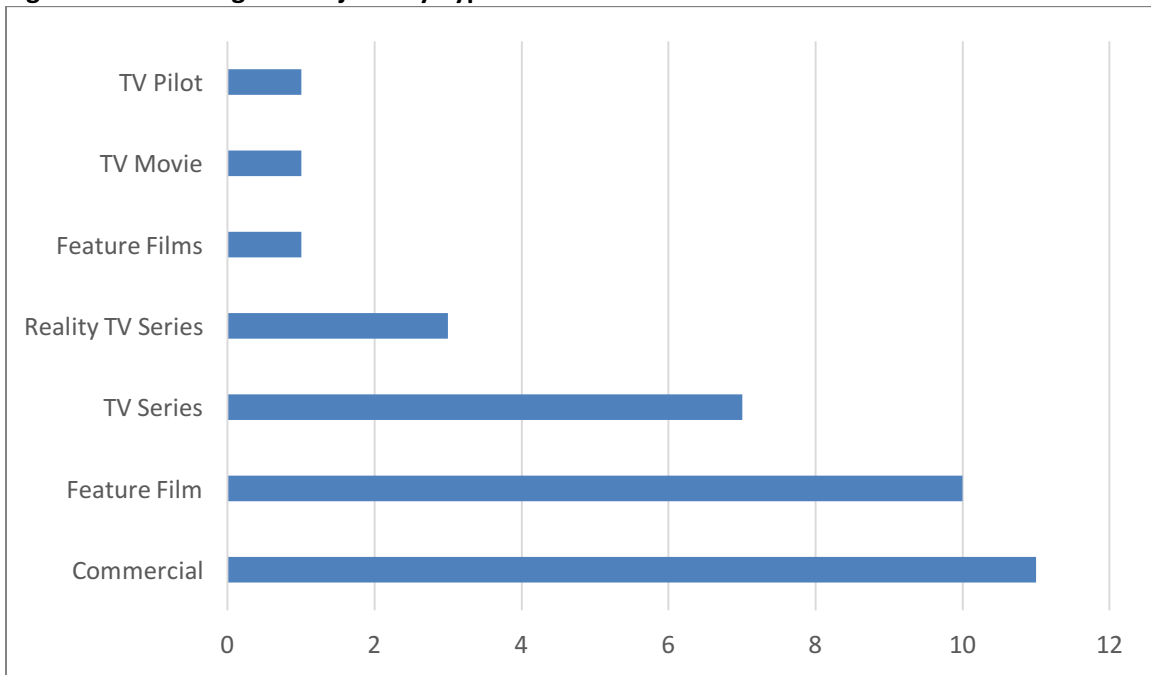
**Figure 2: State of Texas Funding for the Texas Moving Image Industry Incentive**



Source: Texas Film Commission

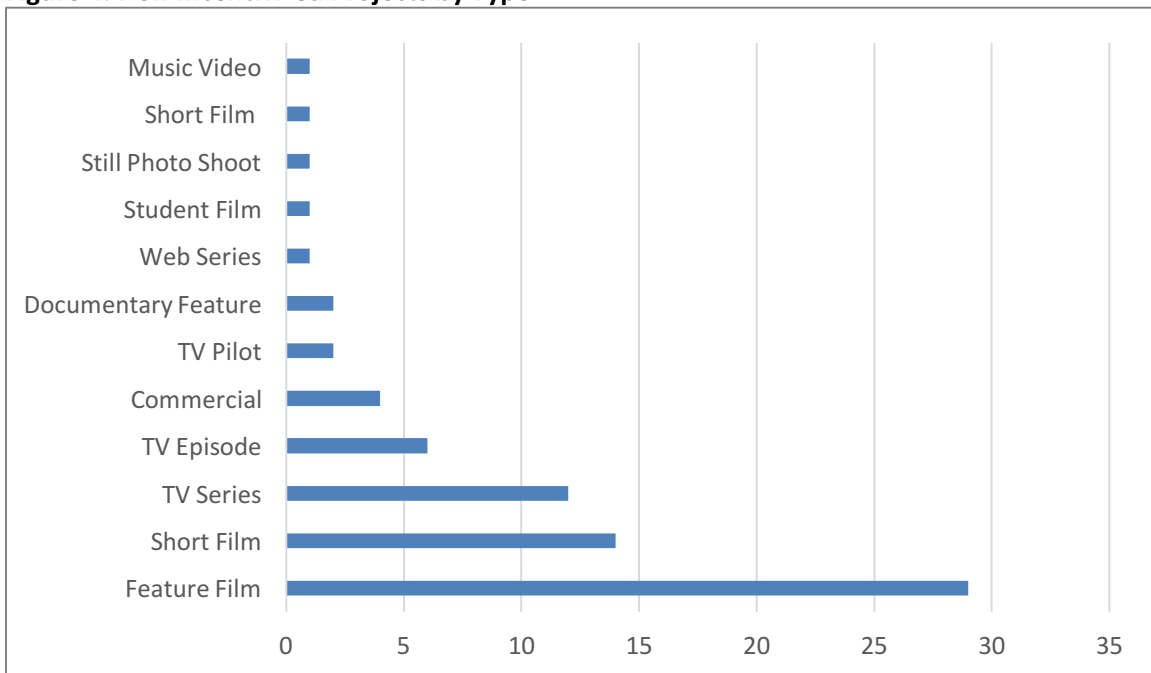


**Figure 3: TMIIP Eligible Projects by Type**



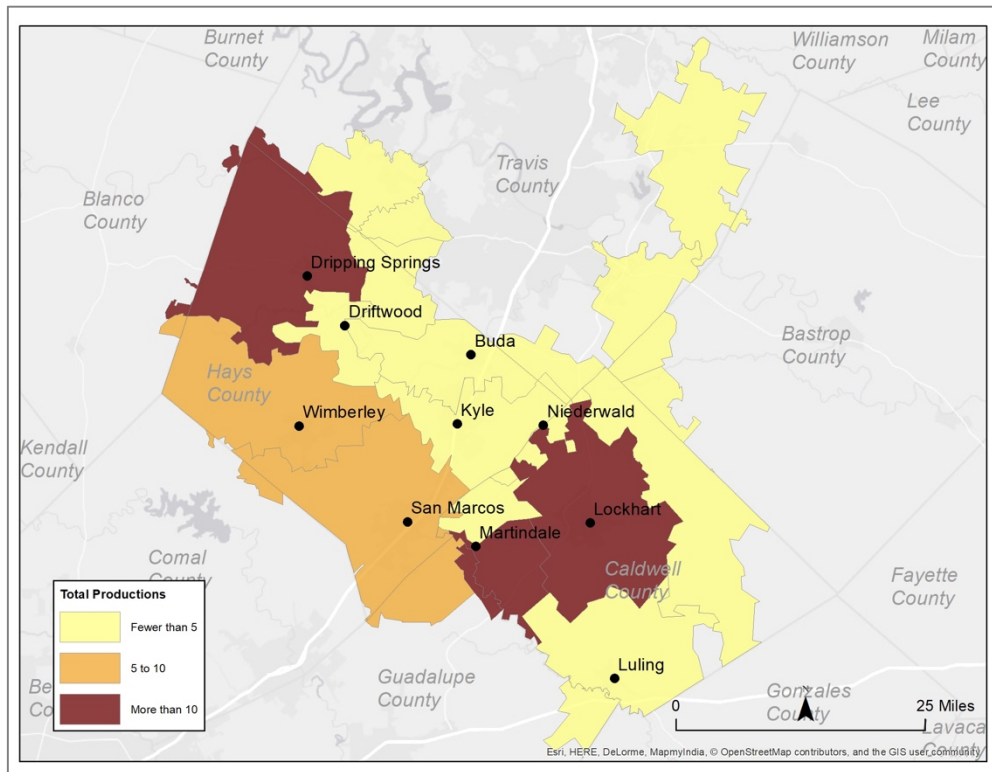
Source: Texas Film Commission

**Figure 4: Non-Incentivized Projects by Type**



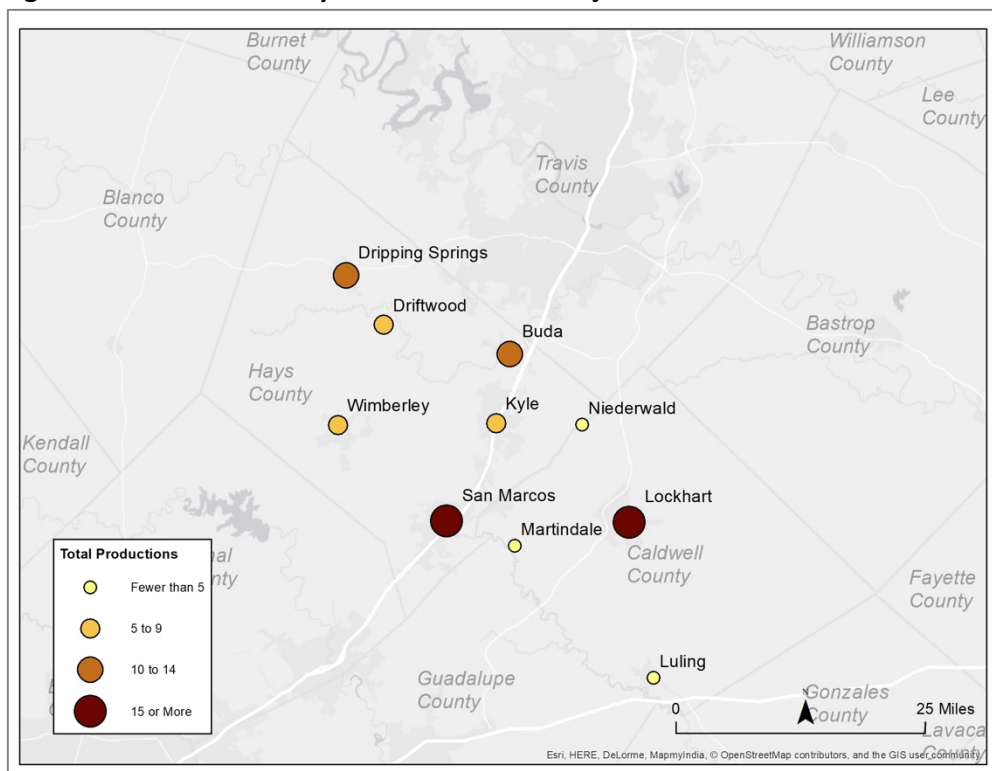
Source: Texas Film Commission

**Figure 5: Paid Locations (businesses or residential) used by TMIIP Projects**



Source: TXP, Texas Film Commission

**Figure 6: Locations used by Non-Incentivized Projects**



Source: TXP, Texas Film Commission

### Economic Impact Methodology

Economists use a number of statistics to describe regional economic activity. Four common measures are “Output” which describes total economic activity and is generally equivalent to a firm’s gross sales; “Value Added” which equals gross output of an industry or a sector less its intermediate inputs; “Labor Income” which corresponds to wages and benefits; and “Employment” which refers to jobs that have been created in the local economy.

In an input-output analysis of new economic activity, it is useful to distinguish three types of expenditure effects: direct, indirect, and induced.

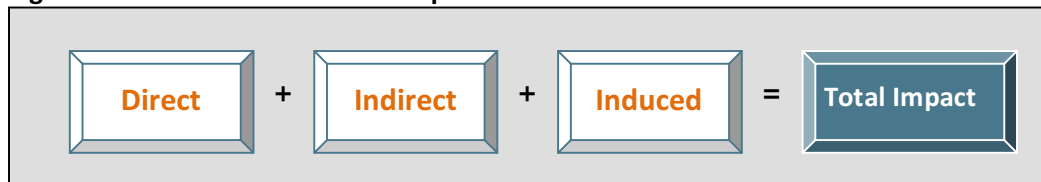
**Direct effects** are production changes associated with the immediate effects or final demand changes. The payment made by an out-of-town visitor to a hotel operator or the taxi fare paid for transportation while in town are examples of direct effects.

**Indirect effects** are production changes in backward-linked industries caused by the changing input needs of directly affected industries – typically, additional purchases to produce additional output. Satisfying the demand for an overnight stay will require the hotel operator to purchase additional cleaning supplies and services. The taxi driver will have to replace the gasoline consumed during the trip from the airport. These downstream purchases affect the economic output of other local merchants.

**Induced effects** are the changes in regional household spending patterns caused by changes in household income generated from the direct and indirect effects. Both the hotel operator and taxi driver experience increased income from the visitor’s stay, as do the cleaning supplies outlet and the gas station proprietor. Induced effects capture the way in which increased income is spent in the local economy.

A multiplier reflects the interaction between different sectors of the economy. An output multiplier of 1.4, for example, means that for every \$1,000 injected into the economy, all other sectors produce an additional \$400 in output. The larger the multiplier, the greater the impact will be in the regional economy.

**Figure 7: The Flow of Economic Impacts**



For this study, TXP used the RIMS II economic impact model produced by the U.S. Bureau of Economic Analysis.

### Economic Impact of the Moving Image Industry

Based on the data provided by the Texas Film Commission, TXP estimates that \$13.7 million was spent directly within Caldwell & Hays Counties between 2008 and 2016. This amount includes eligible TMIIP projects, non-incentivized activity, and *The Leftovers, Season 2* (not included in TMIIP data). Spending per year fluctuated based on the number and type of productions. TXP adjusted the model inputs by the type of production (ex. film, TV commercial, or series). Note, the Texas Film Commission does not provide eligible spending by year. TXP used the \$13.7 million as the input into an econometric model to estimate the total economic impact of this local spending on the Study Area.

The Texas Film Commission focuses on collecting information on aggregate eligible statewide spending, not detailed information on spending by locations used. The implication is that the \$13.7 million is a conservative number that underestimates the direct impact on the Study Area. For example, the TMIIP dataset does not have sufficient information to calculate the personal spending impact of a filming crew at local restaurants and shops. Yes, the eligible catering spending is included in the TMIIP application, but not individual purchases made by the film crew, actors, or production assistants. Based on anecdotal evidence and stakeholder input, a large production based in Austin might only travel to Caldwell & Hays Counties for a few days but not ever spend the night at area hotels. To derive a more accurate spending impact, each production filming in the Study Area would need to provide detailed information on days filming, number of workers onsite, hotel nights reserved, etc.

Between 2008 and 2016, total economic activity attributable to the motion picture, film, and TV productions was \$26.7 million and supported 185 jobs. These findings are consistent with the size of local industry.

**Table 3: Total Economic Impact of Motion Picture, Film, and TV Production Spending in Caldwell & Hays Counties from 2008 to 2016**

	Output	Value Added	Labor Income	Employment
Total Impact of Spending (2008 to 2016)	\$26,736,788	\$15,167,814	\$5,780,371	185

Source: TXP, Inc.

### Tax Revenue Impact of the Moving Image Industry

To provide an “order of magnitude” estimate for local general fund tax revenue attributable to the Study Area’s moving image industry, TXP relied on the historic relationship between gross domestic product (GDP – the measure of economic activity in the local economy), wages, and tax revenue. Based on the total economic activity outlined in Table 3, TXP estimates the Study Area’s public sector jurisdictions collected \$360,975 in general fund tax revenue between 2008 and 2016 related to the moving image industry activity.

## Findings & Conclusion

While major moving image industry productions in Caldwell & Hays Counties get the bulk of attention and local media coverage, the potential to leverage this broad sector as an engine of economic development has yet to be realized. That could soon change, as the pieces of the puzzle are in place: a variety of local artists and producers representing diverse genres; demonstrable interest from local audiences; and educational opportunities at Texas State University. As Caldwell & Hays Counties look to its economic development future, the moving image industry is an area of real opportunity. The following key findings emerged as opportunities to focus on to grow the moving image industry sector:

1. The Study Area has benefited to some extent from the generalized brand identity created by Austin around creativity and lifestyle, but **the moving image industry offers the opportunity to draw attention to the unique attributes of Caldwell & Hays Counties**, especially related to costs and “authenticity,” that are found locally.
2. At a time when the State of Texas is pulling back in terms of incentives, **Caldwell & Hays Counties could enhance their position with a more aggressive approach to providing incentives for film and visual media production.** Areas to specifically examine include rebate of some portion of generated sales taxes and lodging taxes.
3. Access to resources is a major issue identified by local stakeholders, much of which involves equipment, office space, storage, and filming locations. **The motion picture, film, and TV production sector in the Study Area appears ripe for some type of cooperative arrangement, where both visiting productions and local filmmakers can rent space (both office and storage) and equipment.** This model of shared resources often works well when the capital costs are covered through grant funding, or public resources, and then fees to use the equipment/space are set to cover operating costs.
4. Texas State University is an important part of the equation for the moving image industry in Caldwell & Hays Counties, providing talent, knowledge, and locations. **Texas State University should examine ways to make it easier for moving image industry productions to access its resources (ex. Office of Film Management) and expand classes offered (ex. concentration related to the moving image industry).**
5. **The complex, multi-departmental nature of the motion picture, film, and TV production sector’s interaction with the different stakeholders warrants an initial functional point of contact** (likely at the Greater San Marcos Partnership). This contact person or group would then work with the individual communities.

## Appendix 1 – TMIIP Projects Produced in Caldwell & Hays Counties

Name of Project	Project Type	Location
Tree of Life	Feature Film	San Marcos
The Lying Game, Season 1	TV Series	San Marcos
The Bystander Theory	Feature Film	Dale, Lockhart
Joe	Feature Film	Del Valle, Lockhart, Manor
ESPN	Commercial	San Marcos
Touchstone Energy	Commercial	Buda, Driftwood, Dripping Springs
HEB 50	Commercial	Austin (Hays County)
Revolution, Season 2	TV Series	Buda, Lockhart, Luling, Martindale, Maxwell, Wimberley, Umland
Thunder Broke the Heavens	Feature Films	Buda, Kyle, San Marcos, Wimberley, Woodcreek
Boot Barn 1	Commercial	Dripping Springs
Troubadour, TX, Season 2	TV Series	Wimberley
Deliverance Creek	TV Movie	Driftwood, Dripping Springs, Wimberley
Highway 130 Revisited	Commercial	Lockhart
Pale Blue Dot	Feature Film	Dripping Springs
Verizon Connected Devices	Commercial	San Marcos
Hot Air	Feature Film	Wimberley
Lone Star Lady	Reality TV Series	Dripping Springs
The Ex and the Why	Reality TV Series	Driftwood
Lost in the Sun	Feature Film	Lockhart
Found Footage 3D	Feature Film	Dale
The Doo Dah Man	Feature Film	Austin (Hays Co.) Buda, Dale, Lockhart
NHTSA Drive Sober	Commercial	Lockhart
American Crime, Season 1	TV Series	San Marcos
From Dusk Till Dawn, Season 1	TV Series	Lockhart. Luling
Hysteria	TV Pilot	Austin [Hays County]
Smirnoff "Flavors and Recipes"	Commercial	Wimberley
Everybody Wants Some	Feature Film	San Marcos, Wimberley
Kraft	Commercial	Kyle
Toyota	Commercial	Dripping Springs
Kellogg's/Wal-Mart	Commercial	Dripping Springs
From Dusk Till Dawn, Season 2	TV Series	Lockhart
American Crime, Season 2	TV Series	San Marcos
A Relative Stranger	Feature Film	Driftwood
Iron Resurrection	Reality TV Series	Dripping Springs

## Appendix 2 – Caldwell County Non-incentivized Projects

Name of Project	Project Type	Location
Amnesia	Feature Film	Lockhart
BBQ With Franklin	TV Series	Lockhart
Best Friends Forever	Feature Film	Lockhart
Book of Babylon	Feature Film	Lockhart
Cinema Six	Feature Film	Lockhart
Corruption.Gov	Feature Film	Martindale
Frankenfood - Season 1	TV Episode	Lockhart
Giant Visions of Tiny Places	Short Film	Luling
Mercury Plans	Feature Film	Lockhart
Red, White & Grill	TV Episode	Lockhart
Secret at Arrow Lake	Feature Film	Lockhart
Secrets of A Psychopath	Feature Film	Lockhart
Somebody's Gotta Do It - Season 1	TV Episode	Luling
The Daytripper - Season 1	TV Series	Luling
The Daytripper - Season 1	TV Series	Luling
The Daytripper - Season 2	TV Series	Lockhart
The Garden and The Wilderness	Short Film	Lockhart
The Green Ghost	Feature Film	Lockhart
The Interrogator	Short Film	Lockhart
Transformers: Age of Extinction	Feature Film	Lockhart



## Appendix 3 – Hays County Non-incentivized Projects

Name of Project	Project Type	Location
A Better Life	Short Film	Dripping Springs
American Pickers, Season 7	TV Episodes	Dripping Springs; Wimberley
As Far as The Eye Can See	Feature Film	Niederwald
Aztex Soccer Club Promo	Commercial	Dripping Springs
BBQ With Franklin	TV Series	Buda
Billy And the Bandit	TV Pilot	Buda
Boyhood	Feature Film	San Marcos
Breaking the Press	Feature Film	Kyle
Camp Kickitoo	Feature Film	Wimberley
Chasing Grace	Short Film	Dripping Springs
Chasing Waters	TV Episode	San Marcos
ChickenfUt	Short Film	Buda
Cup of Love	Short Film	Buda
Dodge Dart Commercial	Commercial	Driftwood; Dripping Springs
Eddy	Short Film	Wimberley
Forward	Feature Film	San Marcos
Freak Out	Short Film	Buda
George Clarke's Amazing Spaces	TV Episode	Driftwood
HGTV House Hunters Renovation	TV Series	Driftwood
Into Oust: Into the Desert	Short Film	Buda
Kill or Be Killed	Feature Film	Dripping Springs
La Barracuda	Feature Film	Dripping Springs
Louis Vuitton Still Photo Shoot	Still Photo Shoot	Wimberley
Megan And Dan	Student Film	Buda
Mirage	Short Film	Buda
My Big Family Renovation	TV Series	Buda
On Time	Short Film	Buda; Kyle
Orphan Train	Feature Film	San Marcos
Pastor Shepherd	Feature Film	Wimberley
Pony with A Broken Wing	Feature Film	Dripping Springs
Ruth's Locket	Short Film	San Marcos
Secret at Arrow Lake	Feature Film	Kyle; Wimberley
Shilo	Feature Film	Dripping Springs
Sir Doug and The Genuine Texas Cosmic Groove	Documentary Feature	Wimberley
Snakemagic.Com	TV Pilot	San Marcos
Spring Eddy	Feature Film	San Marcos
Stop	Short	San Marcos
Summer League	Feature Film	Kyle

Name of Project	Project Type	Location
Sunny and Jordan Shipley "Don't Let Me Sink"	Music Video	Driftwood; Wimberley
Texas Music Scene with Ray Benson	TV Series	San Marcos
Texas Tourism: Imagination	Commercial	Dripping Springs
Texas Tourism: Many Flavors	Commercial	Driftwood
The Ascent	Feature Film	Kyle
The Association	Feature Film	Buda
The Daytripper, Season 2	TV Series	Wimberley
The Daytripper, Season 4	TV Series	Dripping Springs
The Daytripper, Season 5	TV Series	San Marcos
The Ex & The Why	TV Series	Driftwood
The Gauntlet	Web Series	San Marcos
The Green Ghost	Feature Film	San Marcos
The Horse Bride	Short Film	Dripping Springs
The Teller and The Truth	Feature Film	San Marcos
Tiramisu for Two	Feature Film	San Marcos
Yakona	Documentary Feature	San Marcos

## Appendix 4 – Productions filmed on location at Texas State University

Productions filmed on location at Texas State include:

1. Dreamwoods Studios (untitled film for Indian market), March 2017
2. Reset Content (Bank of America commercial), February 2016
3. Pulsations (“Adventures de medicine” for France 2 television), September 2015
4. USA Deaf Sports Federation (online video), September 2015
5. Stone Ward (Sport Clips online video), March 2015
6. Exploration Production (“Daily Planet” and/or “Discovery Specials”), January 2015
7. National Geographic Society (online video), October 2014
8. TWITA (“Everybody Wants Some!!!”), October 2014
9. Burning Bright Productions (“Almost Royal”), February 2014
10. Air Force Recruiting Service Marketing, November 2013
11. Red J Films (“El Chupacabra”), September 2013
12. Arts + Labor (Dell commercial), August 2013
13. Fuedl Films (commercial), April 2013
14. Fuedl Films (Verizon commercial), January 2013
15. Pilgrim Operations (“Only in America” for A&E Television), November 2012
16. Barcroft Productions (“The Unbelievable Truth”), September 2012
17. Independent Media (AARP commercial), April 2012

Other notable film productions:

1. Boyhood (2014)
2. Friday Night Lights (2006-2011)
3. The Ringer (2005)
4. D.O.A. (1988)
5. The Getaway (1972)

## Appendix 5 – Detailed Economic Impact Table

### Total Economic Impact of Motion Picture, Film, and TV Production Spending in Caldwell & Hays Counties from 2008 to 2016

Industry Sector	Output	Value Added	Labor Income	Employment
Agriculture, forestry, fishing,	\$2,744	\$1,372	\$1,372	0
Mining	\$31,557	\$20,580	\$5,488	0
Utilities	\$190,712	\$108,391	\$28,813	0
Construction	\$104,274	\$57,625	\$31,557	1
Durable goods manufacturing	\$284,011	\$137,203	\$65,858	1
Nondurable goods manufacturing	\$292,243	\$122,111	\$63,113	1
Wholesale trade	\$367,705	\$249,710	\$109,763	1
Retail trade	\$616,042	\$410,238	\$216,781	7
Transportation and warehousing	\$318,311	\$176,992	\$112,507	3
Information	\$17,165,492	\$9,379,211	\$2,844,222	104
Finance and insurance	\$1,240,317	\$640,739	\$321,055	6
Real estate and rental and leasing	\$1,649,182	\$1,159,367	\$271,662	10
Professional, scientific, tech.	\$1,317,151	\$854,776	\$541,953	8
Management of companies	\$63,113	\$37,045	\$26,069	0
Administrative and waste services	\$503,536	\$345,752	\$240,106	7
Educational services	\$104,274	\$63,113	\$48,021	2
Health care and social assistance	\$635,251	\$382,797	\$285,383	6
Arts, entertainment, and	\$1,060,581	\$572,137	\$285,383	17
Accommodation	\$119,367	\$75,462	\$32,929	1
Food services and drinking places	\$300,475	\$157,784	\$98,786	5
Other services	\$370,449	\$207,177	\$141,319	4
Households	\$0	\$8,232	\$8,232	1
<b>Total</b>	<b>\$26,736,788</b>	<b>\$15,167,814</b>	<b>\$5,780,371</b>	<b>185</b>

Source: TXP, Inc.



## Legal Disclaimer

TXP, Inc. (TXP) reserves the right to make changes, corrections, and/or improvements at any time and without notice. In addition, TXP disclaims any and all liability for damages incurred directly or indirectly as a result of errors, omissions, or discrepancies. TXP disclaims any liability due to errors, omissions, or discrepancies made by third parties whose material TXP relied on in good faith to produce the report.

Any statements involving matters of opinion or estimates, whether or not so expressly stated, are set forth as such and not as representations of fact, and no representation is made that such opinions or estimates will be realized. The information and expressions of opinion contained herein are subject to change without notice, and shall not, under any circumstances, create any implications that there has been no change or updates.