# NEW YORK CITY FILM & TELEVISION INDUSTRY

NYC Media & Entertainment

Economic Impact Study 2021

Drive-in theater screening at Flushing Meadows Corona Park in Queens, New York. Image courtesy of the Queens Drive-in.

*God Friended Me* (2018). Image courtesy of Warner Bros. Entertainment.

# LETTER FROM THE COMMISSIONER

Dear Friends,

In my time leading the Mayor's Office of Media and Entertainment (MOME), I've witnessed the exponential growth of this industry firsthand.

In 2019, motion picture production reached an all-time high in New York City, with over 80 episodic television series and 300 feature films, including three blockbuster films, *In the Heights*, *West Side Story* and *Clifford the Big Red Dog* filming simultaneously.

This report tells a story about the thriving film and television industry in New York City, how it persevered despite a pandemic, and how it continues to grow and evolve as technology changes. None of this success is by accident: the industry thrives here because of the talent that calls it home, the international renown of New York City, and the commitment of City government to support the creative economy.

For over 50 years, the Mayor's Office of Media and Entertainment (MOME) has worked to advance New York City's role as a global media capital. Through our Office of Film, Theatre and Broadcasting, we coordinate motion picture production throughout the five boroughs. We  created and continue to expand our workforce training programs to increase access to opportunities in the industry for New Yorkers and our marketing campaigns to promote locally produced films, TV shows and festivals to one of the biggest media audiences in the world.

As this report shows, the film and television industry plays a leading role in New York City's economy and culture. Its ongoing strength will help New York City's creative sectors rebound and set the stage for an equitable recovery for all New Yorkers.

Sincerely,

Anne del Castillo
Commissioner
New York City Mayor's Office of
Media and Entertainment

## About the Mayor's Office of Media and Entertainment

The Mayor's Office of Media and Entertainment (MOME) comprises four divisions: the Office of Film, Theatre and Broadcasting, which coordinates film and television production throughout the five boroughs; NYC Media, the largest municipal television and radio broadcasting entity in the country with a reach of 18 million viewers within a 50-mile radius; workforce and educational initiatives in film, television, theater, music, publishing, advertising and digital content to support the development of NYC's creative industries; and the office of Nightlife, supporting the sustainable development of New York City's nightlife industry. Overall, MOME supports over $104 billion in economic activity and nearly half a million workers.

## About the Consultants

**BuroHappold Cities** is an international, interdisciplinary team of consultants that provides strategic planning, project management, and analytical services to a diverse range of public and private sector clients. The team brings together planners, economists, engineers, urban designers, real estate professionals, and demographers to tackle urban development problems that represent the built environment at its broadest scale. BuroHappold follows an evidence-based planning approach that ensures tailor-made and highly effective solutions for today's multi-layered urban issues.

**Public Works Partners** is a WBE/DBE/SBE certified planning and consulting firm rooted in New York City. We build stronger neighborhoods and stronger organizations. We engage communities, design smart plans, and implement policies for our public and nonprofit clients. Our goal is to increase our client's impact.

**Nowhere Office** is a New York-based M/WBE multidisciplinary design studio with a focus in civic, social, and cultural projects.

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## NEW YORK CITY HAS LONG PLAYED A VITAL ROLE IN THE GLOBAL FILM AND TELEVISION INDUSTRY.

## LIKEWISE, FILM & TELEVISION HAS GREATLY INFLUENCED THE CITY'S DEVEL-OPMENT, BOTH CULTURALLY AND ECONOMICALLY.

In 2019, the film and television industry in New York City supported approximately

**185,000**
total jobs

**$18.1 BILLION**
in total wages

**$81.6 BILLION**
in total output

Countless classics have been filmed in the city, which itself provides unparalleled scenery, from gritty streets to breath-taking skylines, and fodder for diverse and compelling stories. An expansive range of industry players comprise New York City's film and television ecosystem, making it one of the largest and most multifaceted in the world.

Indeed, in 2019, New York City's film and television industry supported over 185,000 total (direct, indirect, and induced) jobs in the city, accounting for over $18 billion in total wages and $82 billion in total economic output (business revenues and self-employment receipts). The industry consists of seven key sectors: motion picture and video production, talent, subscription programming, television broadcasting, advertising and media buying, postproduction and other services, and distribution and consumption. These sectors are mutually reinforcing, and each plays a crucial role in the industry's value chain, from the production of film and television content through to its consumption by viewers and enthusiasts.

This report evaluates these sectors and their economic impacts. Its findings include:

- The seven sectors that make up New York City's film and television industry are directly responsible for 100,200 jobs (2 percent of all jobs in the city), $12.2 billion in wages, and $64.1 billion in direct economic output.

- Over the last 15 years, the industry has added roughly 35,000 direct jobs, growing at an annual rate of 3 percent and outpacing the citywide job growth rate of 2 percent over this period. These are, by and large, very high-paying jobs. Industry professionals earn an average of $121,000 in annual wages (33 percent higher than the citywide average of $91,000) and these wages have grown at a rate of 2 percent annually, keeping pace with the city's overall wage growth rate.

- In terms of indirect economic impacts, New York City's film and television industry supports an additional 37,900 jobs, $2.9 billion in wages, and $8.2 billion in economic output by way of transactions with suppliers and vendors to the industry's main sectors.

- The industry's induced economic impacts, which are created when job holders—both directly and indirectly supported by the industry—spend their wages in New York City, account for an additional 46,900 jobs, $3.1 billion in wages, and $9.3 billion in economic output.

This report also takes an in-depth look at the industry's seven sectors and explores their characteristics, dynamics, and trends. Among the key findings are:

*Motion picture and video production is the job creation engine driving employment in New York City's film and television industry.*

- The motion picture and video production sector is the industry's largest employer, accounting for 46,700 direct jobs in 2019 (almost half of all direct industry jobs); the vast majority of these jobs are on film and television production sets throughout the city.

- Between 2004 and 2019, employment in the motion picture and video production sector grew at an annual rate of 5 percent, outpacing the city average job growth rate of 2 percent over the same period. This growth is attributable to the nationwide film and television production boom that began in the 2000's, coupled with other factors such as New York City's strong production workforce and the New York State Film Production Tax Credit.

*New York State tax credit programs have been instrumental for industry growth and remain key to attracting industry activity to New York City.*

- Introduced in 2004, the New York State Film Production Tax Credit program helped New York City benefit from a nationwide film and television content production boom. The program's introduction was particularly beneficial for the motion picture and video production sector, which has accounted for 75 percent of the direct industry jobs added since 2004.

- Building on the tax credit program's success, New York State introduced an additional Post-Production Tax Credit in 2010. Between 2010 and 2019, postproduction jobs grew at an annual rate of 4 percent, double the citywide growth rate of 2 percent over the same period.

*New York City's soundstages and production facilities are rapidly expanding to meet increased demand, to the benefit of formerly industrial neighborhoods with underutilized assets.*

- New York City is home to about 60 qualified production facilities (QPFs)—as defined by the Film Production Tax Credit Program—located in all five boroughs and concentrated in Manhattan, Brooklyn, and Queens. These facilities constitute almost 2 million square feet of production space, and this figure is expected to


Soundstage at Feirstein Graduate School of Cinema. Image courtesy of Feirstein Graduate School of Cinema.

nearly double in the next few years as existing expansion projects are completed and new facilities open. These facilities also vary in type and size: a handful are very large, multi-stage facilities widely regarded as world-class film and television production hubs; most others are smaller, single- or several-stage facilities.

- Soundstages are often repurposed industrial buildings, such as warehouses and hangars; as a result, soundstage space is concentrated in formerly industrial areas. The growing presence of production facilities in these neighborhoods has helped revitalize local economies. Between 2001 and 2019, jobs in the motion picture and video production sector grew at an annual rate of 9 percent in Brooklyn and 8 percent in Queens (compared to 3 percent citywide), reflecting in part the expansion of soundstages and production facilities in these two boroughs.

*Independent film thrives in New York City and distinguishes the city from other production hubs.*

+ Approximately 85 percent of filmmaking in New York City is independent, meaning that production is not funded by one of the industry's major studios. Independent films are often exhibited at film festivals or in limited runs at independent movie theaters, and New York City's robust field of independent distribution outlets distinguishes the city's film scene for filmmakers and enthusiasts.

+ Industry professionals praise the diversity of storytelling and representation that is fostered by the strength of New York City's independent film scene. The city's critical mass of independent filmmakers helps further attract and retain aspiring talent, as well as distributors and financiers looking to elevate new voices.

*Television drives production spending and hiring in New York City, as television series budgets continue to soar nationwide.*

- Local spending and hiring by television productions in New York City has increased year-over-year since at least 2015. Today, television spending and hiring is significantly higher than that of film, in part because the vast majority of films in the city are independent, for which budgets and crews tend to be smaller. In 2018, film productions receiving tax credits in New York City had an average local spend of $4.5 million, compared to television productions' average spend of $34 million. Both film and television are nevertheless crucial to the city's culture and economy.

*Cable networks and subscription programming companies make up the financial engine driving economic activity in New York City's film and television industry.*

- New York City's cable networks and subscription programming companies contributed over 40 percent of the industry's direct economic output in 2019. This is a high-revenue and highly consolidated sector, where a handful of corporations own the vast majority of subscription programming companies. These companies fund a significant amount of film and television production and, in doing so, support jobs and activity in other industry sectors.

- Subscription programming is also an area of significant economic growth. Between 2012 and 2019, subscription programming's output increased by almost 50 percent. In addition, jobs in the sector are the highest paying in the industry, with an average annual wage per job of $222,000, more than double the citywide average, due to the high concentration of corporate executives and staff at subscription programming companies in New York City.

*New York City's film and television industry is integral to the city's vast arts, media, and entertainment ecosystem, and vice-versa.*

- The tens of thousands of creative professionals that work in New York City's film and television industry enjoy a high degree of crossover between film and television and the city's theater, comedy, literature, design, and other creative industries. Over half of the city's television writers also write for other mediums, and many actors work in both theater and film and television.

- The industry's integration with the city's larger arts, media, and entertainment ecosystem is also demonstrated by the strong business relationships and clusters of inter- and intra-industry activity primarily in Manhattan, Brooklyn, and Queens. For example, film and television producers provide a steady pipeline of work for postproduction professionals located near their offices or production studios; Advertising agencies coordinate with and gravitate around their clients' offices; And film studios and television networks collaborate closely with other media industries such as internet and print publishing.

*The industry was disproportionately impacted by the COVID-19 pandemic but a recovery is underway.*

- In the spring of 2020, the COVID-19 pandemic forced a shutdown of non-essential in-person business activities in New York City, dealing a significant blow to the film and television industry, which lost 25 percent of its jobs by Q2 2020 compared to the year prior, whereas the overall New York City economy lost 18 percent of its jobs over this period.

- Some industry sectors, those inherently reliant on in-person activities in congregate settings, fared worse than others. By Q2 2020, the motion picture and video production sector had lost 42 percent of its jobs compared to the year prior as productions halted across the city. Movie theaters also suffered, having to completely cease operations, and losing 75 percent of their jobs by Q2 2020.

- Other industry sectors proved more resilient, generally owing to corporate offices and workforces that could transition to remote work with relative ease. By Q2 2020, the number of jobs in subscription programming was 7 percent lower than the year prior, 3 percent lower in television broadcasting, and 2 percent lower in advertising and media buying.

- In late summer 2020, film and television productions resumed filming with strict public health and safety measures in place; in March 2021, movie theaters began reopening at reduced capacity. At the time of this writing, the industry remains in the early stages of its recovery from the pandemic's disruptions and some long-term effects are still unfolding.

Overall, New York City's film and television industry is dynamic and growing. Yet there are opportunities for the City to help make it stronger. Guided by analysis of industry data and interviews with industry stakeholders, this report outlines six key areas of opportunity for New York City government initiatives:

- Supporting existing and new industry workforce development efforts.
- Enhancing the industry's community relations.
- Investigating the need for further investment to increase soundstage capacity.
- Advocating for the continuation and enhancement of state tax credit programs.
- Promoting the industry's environmental sustainability.
- Supporting the industry's recovery from the COVID-19 pandemic.

# 1. INTRODUCTION

**NEW YORK CITY HAS LONG BEEN THE CULTURAL CAPITAL OF THE UNITED STATES, DUE IN NO SMALL PART TO THE HISTORIC STRENGTH OF THE CITY'S FILM & TELEVISION INDUSTRY.**

From *Miracle on 34th Street* to *Broad City*, New York City has been depicted on-screen as a place of wonder and vitality, helping to reinforce the city's culture and positioning on the global stage. The city's iconic urban landscape has been featured in countless productions, making its skyline, streets, and buildings cultural touchstones for people the world over – including New Yorkers, who delight in the cultural significance of their everyday surroundings.

Film and television not only plays an important role in shaping New York City's culture, it is also a major driver of the local economy. The industry consists of an expansive range of players, from multinational corporations and world-renowned production studios to independent filmmakers and sole proprietor businesses that support the industry. Large and small, these entities collectively make enormous contributions to the city's economy annually and support the livelihoods of hundreds of thousands of New Yorkers.

The film and television industry is also a cornerstone of the city's extensive arts, media, and entertainment ecosystem, within which there are limitless opportunities for collaboration and exchange for businesses and professionals alike. Actors, writers, and directors move fluidly between film and television and the city's world-class theater scene. Late night talk show writers have been known to hone their jokes at the city's many stand-up comedy clubs. *Saturday Night Live* alums have spawned their own New York-based television shows like *30 Rock* and *Brooklyn Nine-Nine*. And a multitude of successful television series – such as *2 Dope Queens* (based on a WNYC podcast), *High Maintenance* (originally a web series), and *Nora from Queens* (starring the comedian Awkwafina) – have emerged from cross-industry collaborations.

New York City's film and television industry enjoys many strengths, as are explained in detail throughout this report, and holds a promising future as a result. The industry in New York City has benefited from a global increase in demand for film and television content in recent years, driven by the rise of streaming services and attendant industry-wide changes. However, it also faces numerous challenges, many of which have been exacerbated by the COVID-19 pandemic, making this moment a critical point in the industry's trajectory. Industry leaders and the City must work together to address the challenges outlined in this report. The City has long recognized the value of the film and television industry as a cultural and economic engine and has already supported numerous initiatives to foster its success.

Set construction at Silvercup Studios North, Bronx NY. Image courtesy of Silvercup Studios.

**Why this study now?**

The Mayor's Office of Media and Entertainment (MOME) regularly conducts studies to build its understanding of New York City's dynamic creative industries. As part of that effort, MOME launched this study in 2019 to provide a detailed assessment of the size, characteristics, and trends of the New York City film and television industry. Because the industry's significance to New York City is so wide-ranging, the study's analysis entailed a multi-layered research process that included:

- An economic analysis of the industry's jobs, wages, and economic output up until the year 2019
- An analysis of film and television productions that have occurred in the city in recent years
- Interviews with over 40 key industry stakeholders and experts
- A literature review of industry studies in other film and television cities to contextualize the study's findings and recommendations

This study was nearing its completion when the COVID-19 pandemic spurred global lockdowns in the early months of 2020. It was temporarily put on hold and upon its resumption, the study's scope was updated to include an analysis of industry activity during the first half of 2020, drawing on the most up-to-date economic data available as well as insights from key industry stakeholders and experts.

This study comes at a critical time. New York City's film and television industry has experienced rapid growth over the last 15 years, with the number of jobs in the industry growing at an annual rate of 3 percent over this period. This growth has been buoyed by the New York State Film Production Tax Credit, which, in addition to encouraging productions to locate in the city, has contributed to the development of critical film and television infrastructure in the city and the growth of New York City's creative workforce.

However, New York City's film and television industry also faces ongoing disruptions and challenges that must be addressed for it to reach its full potential. As of the writing of this study in 2021, the film and television industry is well on its way to recovering from the COVID-19 pandemic, yet lingering effects remain. The full extent of the pandemic's impacts on the industry will likely only be understood years from now when more data is available and the pandemic itself is in the past. To account for these uncertainties, this report includes an evaluation of the pandemic's impacts but focuses primarily on the state of the industry prior to the year 2020. The trends and characteristics observed up until this point bode well for the industry's future; now more than ever, there are opportunities for all industry stakeholders, both in the private sector and local government, to support the return of New York City's film and television industry to its previous trajectory of growth, opportunity, and sustainability.

MOME Movies Under the Stars program. Image courtesy of NYC Parks.

**City programs in support of the film and television industry**

The global film and television industry began in New York City, as Broadway actors in the early 20th century plied their trade for motion picture cameras. By the 1910's, however, industry professionals were decamping for Los Angeles. In 1939, Mayor Fiorello H. La Guardia began aggressively luring the motion picture industry to return to New York City, setting the stage for a variety of government initiatives to support film and television. In 1947, the City established the first office of film coordination (known as the "Co-ordinating Office") and appointed the City's first Coordinator of the Motion Picture Industry to "alleviate the headaches of those movie folk who assign camera crews to take pictures against local backgrounds." In the 1960s, the City continued to try to simplify the process of filming in New York City by establishing a filming permit by local law and creating the NYPD Movie and TV Unit. Today, the Office of Film, Theatre & Broadcasting (OFTB), a division of MOME, and the NYPD Movie and TV Unit continue to help film and television creators from all over the world land their productions in New York City. Annually, the OFTB issues over 11,000 film permits. In addition, MOME runs a number of specialized programs, listed here, aimed at supporting the film and television industry workforce.

- Made in NY Marketing
- Made in NY Campus
- Made in NY PA Training
- Made in NY Postproduction Training
- Made in NY Writers Room
- Made in NY Career Panels
- NYC Women's Fund for Media, Music, and Theater
- NYC Film Green
- MOME Finance Lab
- Women's Screenwriting Contest
- Movies Under the Stars
- Sponsorships of film festivals
- The Animation Project

Renderings of the Made in New York Campus at Bush Terminal. Image courtesy of New York City Economic Development Corporation.

# 2. FILM & TELEVISION INDUSTRY FRAMEWORK

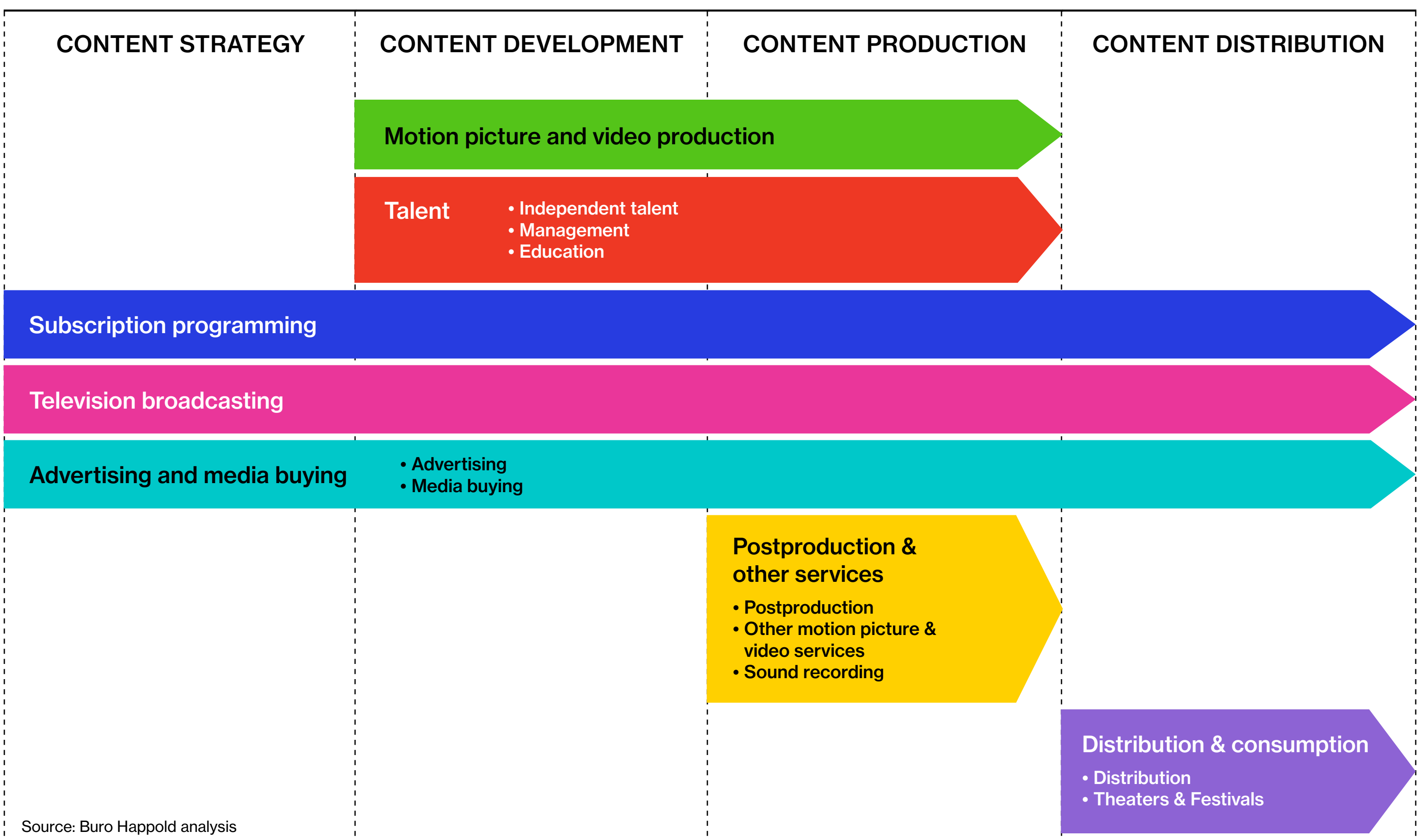
**FOR AN IN-DEPTH LOOK AT THE DYNAMICS, TRENDS, AND ECONOMIC IMPACTS OF NEW YORK CITY'S FILM & TELEVISION INDUSTRY, THIS REPORT IS FRAMED AROUND SEVEN INDUSTRY SECTORS.**

Together, these sectors and their respective subsectors encapsulate the full range of activities in the city's film and television industry.

- **Motion picture and video production:** the studios, independent filmmakers, and crews that produce, or produce and distribute, motion pictures, videos, television programs, and commercials, as well as the soundstages and other facilities where production occurs.
- **Talent:** the industry's freelance creative professionals (such as actors and writers), agents and managers, and film and television-focused educational institutions and programs.
- **Subscription programming:** the companies that broadcast programs on a subscription or fee basis, historically to subscribers of cable or satellite networks and increasingly to subscribers of internet-based streaming platforms. These companies either produce programming in their own facilities or acquire programming from external sources.
- **Television broadcasting:** the companies that operate broadcasting studios and facilities for the broadcasting of television programming to the public, at no additional subscription cost to viewers. Programming originates in these companies' own studios, from affiliated networks, or from external sources.
- **Advertising and media buying:** the advertising and media buying companies that create and place advertising in film and television content, such as commercials, product placements, branded content, and other video advertising.
- **Postproduction and other services:** the companies that provide film and television postproduction services (such as editing and animation), other miscellaneous motion picture and video services, such as film preservation and restoration, and specialized sound recording services.
- **Distribution and consumption:** the movie theaters, film festivals, and distribution companies, which acquire film and television distribution rights and distribute the content to theaters, festivals, and television networks.

Figure 1.

**FILM & TELEVISION INDUSTRY SECTORS AND SUBSECTORS**




Source: Buro Happold analysis

Steiner Studios at Brooklyn Navy Yard, Brooklyn NY.
Image courtesy of Steiner Studios.


STEINER
STUDIOS

# 3. TOTAL ECONOMIC IMPACT

## THE FILM & TELEVISION INDUSTRY IS THE CORNERSTONE OF NEW YORK CITY'S ARTS, MEDIA & ENTERTAINMENT ECOSYSTEM.

In 2019, the film and television industry in New York City supported approximately

**185,000**
total jobs

**$18.1 BILLION**
in total wages

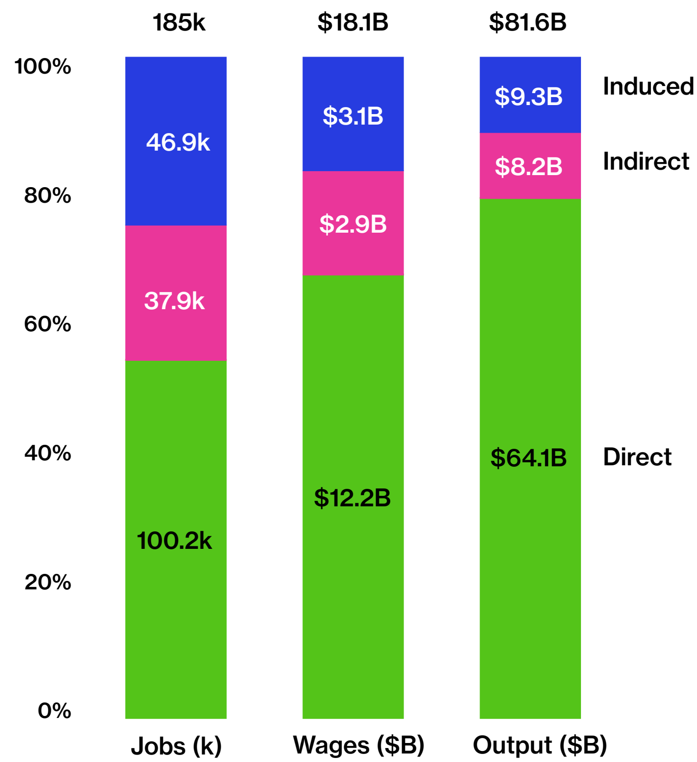
**$81.6 BILLION**
in total economic output

It consists of an expansive range of players, from multinational corporations and world-renowned production studios to small businesses and freelancers. Together, these entities – their jobs, wages, and economic outputs – make enormous contributions to the city's economy annually and are crucial to the city's character and culture.

By all measures, film and television is one of the New York City economy's largest industries. It is a major source of jobs and economic output and drives significant economic activity throughout the city. The sectors in the film and television industry are served by robust local supply chains and ancillary service providers, ranging from legal and advisory firms to equipment rental businesses and food caterers. Furthermore, film and television's digital transformation over the last several decades has made the industry more enmeshed in other aspects of the city's economy, such as internet services and telecommunications, than ever before. This has amplified the industry's overall economic impacts and helped cement it as a mainstay of the city's economy.

Figure 2.

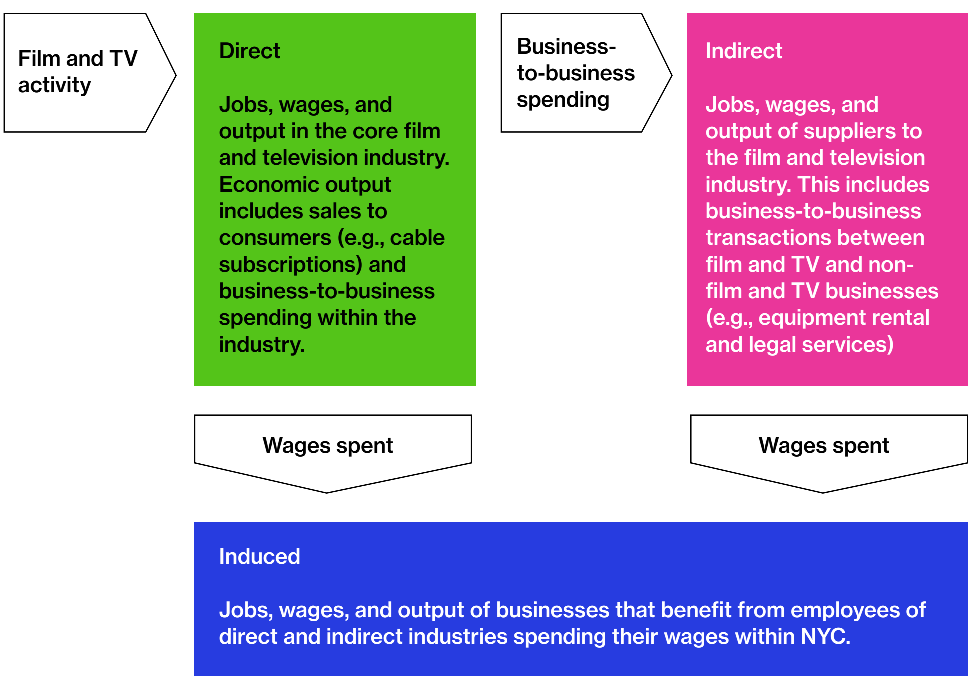
## FILM & TELEVISION INDUSTRY TOTAL ECONOMIC IMPACTS (2019)




Source: Emsi 2019 Quarterly Census of Employment and Wages (QCEW) and Self-Employed (SE) jobs and wages, IMPLAN 2019 New York City data and economic multipliers, Buro Happold analysis

Figure 3.

## TYPES OF ECONOMIC IMPACT




Source: Buro Happold analysis

**Types of economic impact**

The total economic impact of New York City's film and television industry has three components:

**Direct impact**: the jobs, wages, and output generated within the core industry (the seven film and television sectors).

**Indirect impact**: the jobs, wages, and output of the suppliers of goods and services (indirect sectors) to the core industry.

**Induced impact**: the jobs, wages, and output caused by employees in the core industry and indirect sectors spending their wages in New York City.

This study evaluates these different types of economic impact and focuses on the direct impact, since this reflects the industry's direct contribution to the New York City economy by way of the jobs, wages, and economic output it *creates*. The indirect and induced impacts reflect the jobs, wages, and economic output that the industry *supports* in New York City.


Tribeca Festival Hub at Spring Studios.
Image courtesy of the Tribeca Film Festival.

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# 4. DIRECT ECONOMIC IMPACTS BY SECTOR

The core film and television industry—which is responsible for its direct economic impacts—consists of seven sectors:

## MOTION PICTURE & VIDEO PRODUCTION,

## TALENT,

## SUBSCRIPTION PROGRAMMING,

## TELEVISION BROADCASTING,

## ADVERTISING & MEDIA BUYING,

## POSTPRODUCTION & OTHER SERVICES,

## AND

## DISTRIBUTION & CONSUMPTION.

In 2019, these sectors were together directly responsible for:

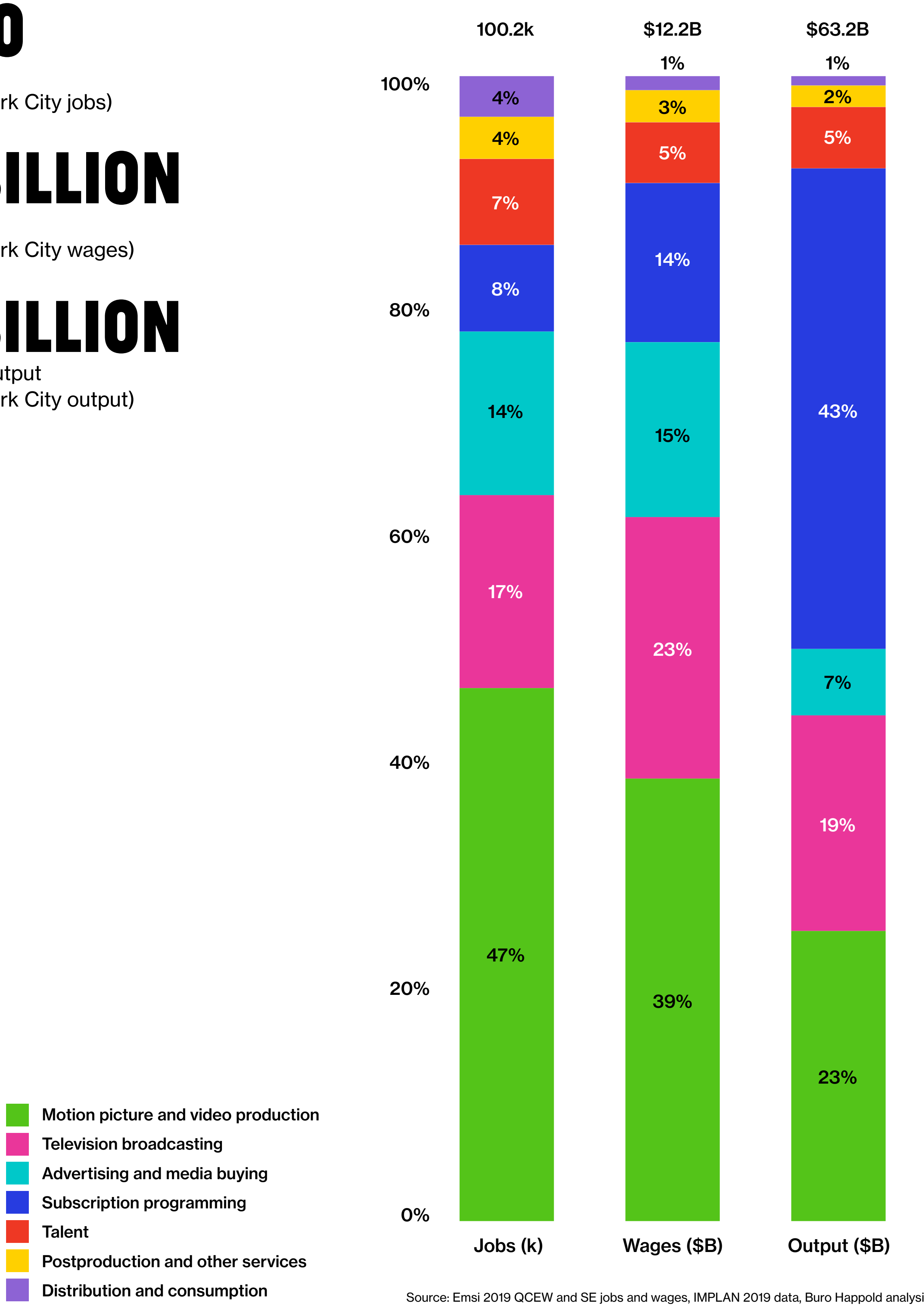
**100,200**
direct jobs
(2 percent of New York City jobs)

**$12.2 BILLION**
in direct wages
(2 percent of New York City wages)

**$64.1 BILLION**
in direct economic output
(4 percent of New York City output)

Figure 4.

### FILM & TELEVISION INDUSTRY DIRECT ECONOMIC IMPACTS BY SECTOR (2019)




Source: Emsi 2019 QCEW and SE jobs and wages, IMPLAN 2019 data, Buro Happold analysis

## Jobs

The number of direct jobs in the film and television industry has grown consistently over the last 15 years. The industry added roughly 35,000 jobs since 2004, growing at an annual rate of 3 percent, outpacing the citywide job growth rate of 2 percent over this period. Most of this growth is attributable to the motion picture and video production sector, the industry's largest employer, which accounted for 75 percent of the industry jobs added since 2004. In 2019, almost half of all industry jobs were in this sector, compared to one third in 2004. The takeaway from this is two-fold. First, the state tax credit program, introduced in 2004, helped the city partake in a nationwide film and television production boom; in turn, the motion picture and video production sector was able to employ New Yorkers in record numbers. After over a decade of consistent growth, New York City now has one of North America's most robust film and television production workforces.

Table 1.

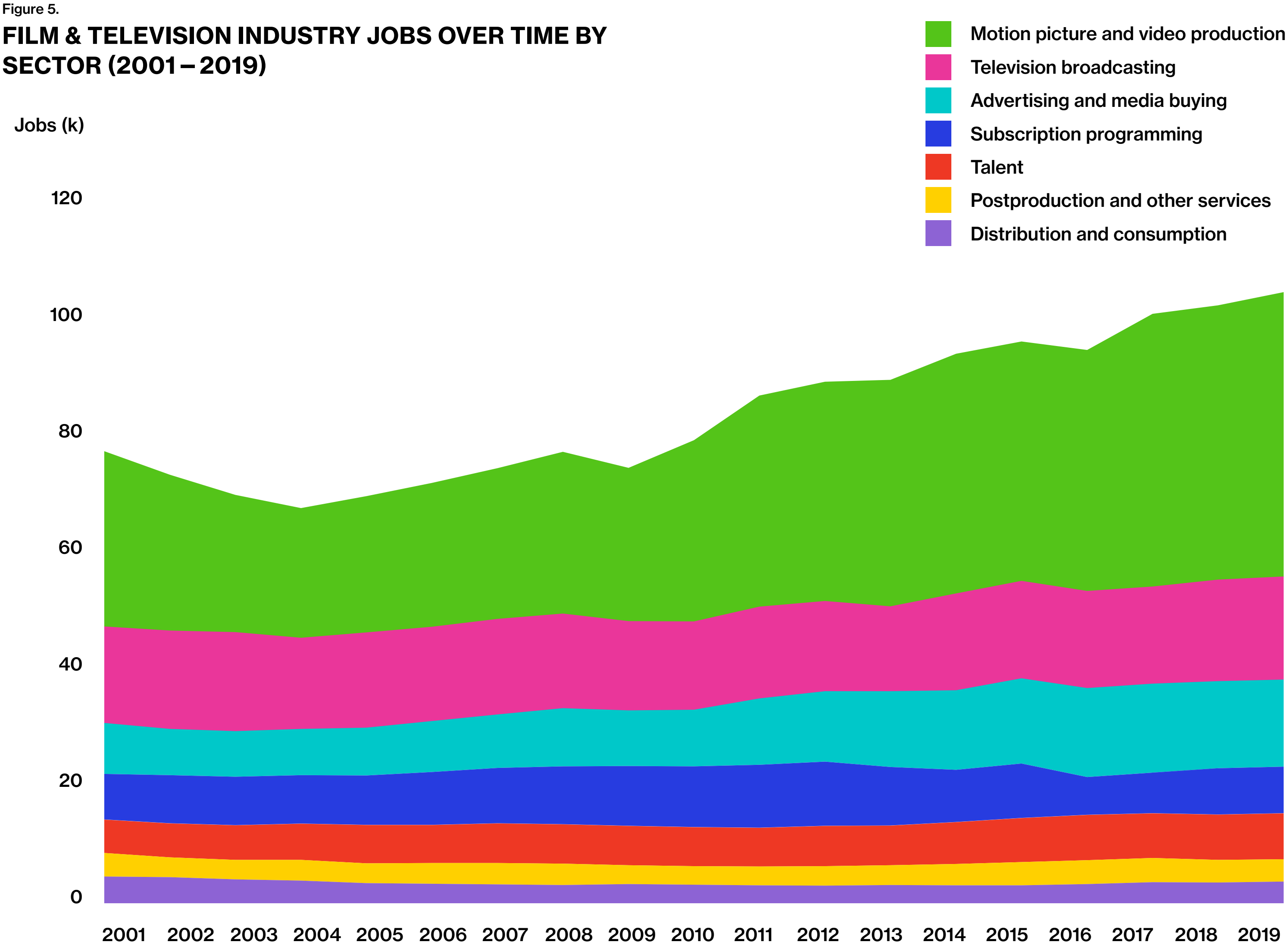
**FILM & TELEVISION INDUSTRY JOB GROWTH RATES BY SECTOR (2001 – 2019)**

| Sector | Long-term compound annual growth rate (CAGR)* (2001–2019) |
|---|---|
| Film and television industry | 2% |
| Motion picture and video production | 3% |
| Talent | 2% |
| Subscription programming | 0% |
| Television broadcasting | 0% |
| Advertising and media buying | 3% |
| Postproduction and other services | 0% |
| Distribution and consumption | -1% |

* The average annual growth rate.
Source: Emsi 2001–2019 QCEW and SE jobs, Buro Happold analysis

Figure 5.

**FILM & TELEVISION INDUSTRY JOBS OVER TIME BY SECTOR (2001 – 2019)**




Source: Emsi 2001-2019 QCEW and SE jobs, Buro Happold analysis

## Wages

New Yorkers working in the film and television industry also earn high wages on average. In 2019, industry professionals earned $12.2 billion in direct wages and the average annual wage was $121,000 per job, 33 percent higher than the citywide average of $91,000. The rate of wage growth over the years has kept pace with the city's average wage growth rate of 2 percent. It is worth noting that wages in the industry vary by sector, and that the industry's very high average annual wage is in part due to jobs in sectors such as subscription programming, where wages are skewed upwards by the large proportion of corporate executives and staff based in New York city.

Table 2.

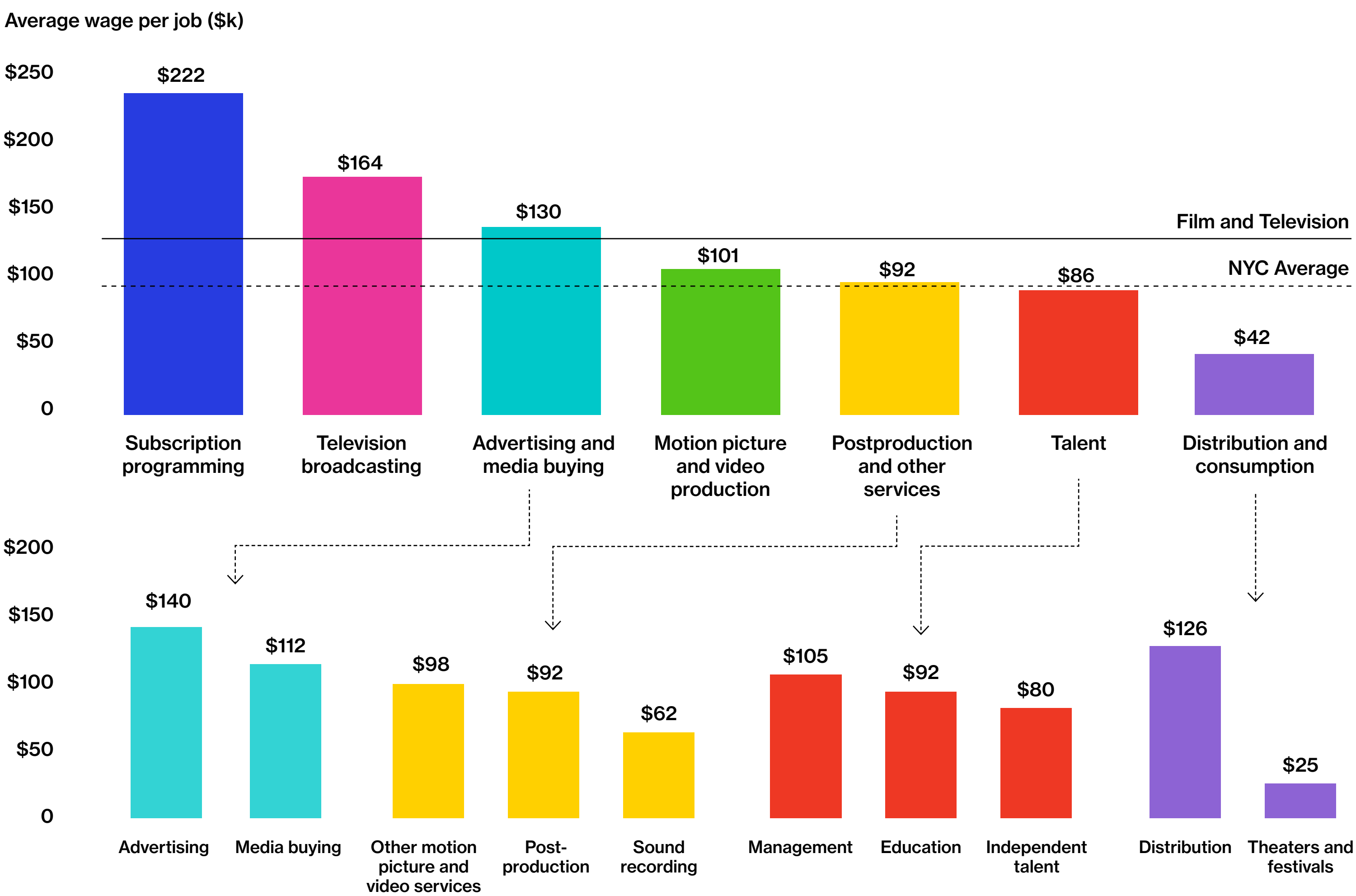
**FILM & TELEVISION INDUSTRY WAGE GROWTH RATES BY SECTOR (2001 – 2019)**

| Sector | Long-term compound annual growth rate (CAGR)* (2001–2019) |
|---|---|
| Film and television industry | 3% |
| Motion picture and video production | 2% |
| Talent | 2% |
| Subscription programming | 5% |
| Television broadcasting | 4% |
| Advertising and media buying | 2% |
| Postproduction and other services | 2% |
| Distribution and consumption | 0% |

Source: Emsi 2001–2019 QCEW and SE jobs, Buro Happold analysis

Figure 6.

**FILM & TELEVISION INDUSTRY AVERAGE ANNUAL WAGES BY SECTOR AND SUB-SECTOR (2019)**




Source: Emsi 2019 QCEW and SE wages, Buro Happold analysis

### Economic Output

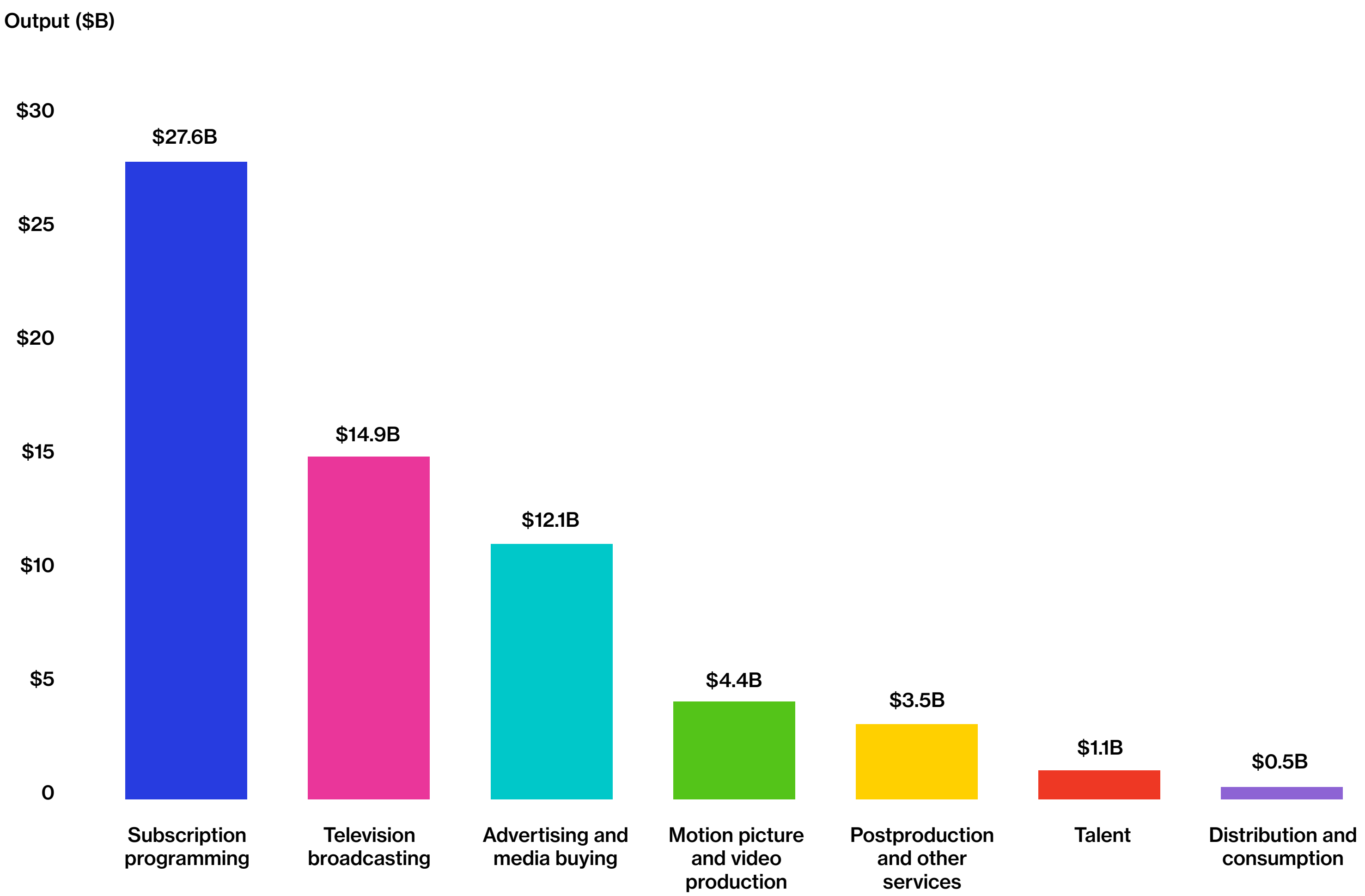
New York City's film and television industry drives significant economic activity in the city. In 2019, the industry generated $64.1 billion in direct annual economic output, which represents the value of the industry's production (or sales) in terms of business revenues and self-employment receipts. By this measure the subscription programming sector is a particularly important component of New York City's film and television industry, having accounted for over 40 percent of the industry's direct economic output in 2019. The sector's outsized economic output makes it the financial engine of the city's film and television industry and a driver of tax revenue for the City, alongside motion picture and video production, the industry's job creation engine.

### Impacts by Sector

The following sections take a deeper look at these different sectors, the dynamics between them, and the distinct ways in which they contribute to New York City's film and television industry. Each sectors' unique characteristics, trends, opportunities, and challenges are explored next.

Figure 7.

**FILM & TELEVISION INDUSTRY OUTPUT BY SECTOR (2019)**




Source: Emsi 2019 QCEW and SE jobs and wages, IMPLAN 2019 New York City data, Buro Happold analysis

# MOTION PICTURE & VIDEO PRODUCTION

Motion picture and video production is at the core of New York City's film and television industry. It is the industry's largest employer and a major driver of economic activity in other industry sectors. Indeed, New York City is one of the busiest motion picture and video production hubs in North America, second only to Los Angeles in the number of films and television programs produced.[1] The sector is also essential to New York City's identity as a global creative capital.

In 2019, the motion picture and video production sector was directly responsible for:

**46,700**
jobs
(47 percent of direct industry jobs)

**$4.7 BILLION**
in wages
(39 percent of direct industry wages)

**$14.9 BILLION**
in economic output
(23 percent of direct industry output)

Production of *Katy Keene* series. Image courtesy of Warner Bros. Entertainment.

The motion picture and video production sector's prominence is in no small part due to the prominence of New York City itself. In countless productions from *Taxi Driver* to *Ghostbusters* to *30 Rock*, New York City – its iconic urban landscape, diversity, and cultural dynamism – plays a starring role. Furthermore, the city is a hub for independent filmmaking; between 2015 and 2018 about 85 percent of films receiving New York State tax credits in New York City were independent productions.* This contrasts with Hollywood, where major studio productions dominate. As such, films produced in New York City tell an exceptionally broad range of stories – not only due to the city's diversity and culture, but also because independent filmmakers tend to be less constrained by representational and narrative norms.

**"NEW YORK CITY IS THE BEST SET IN THE WORLD."**

– Independent producer

* Independent film productions are films produced outside of the major studio system.

New York City has other strengths that make for a thriving motion picture and video production sector. It benefits from the New York State Film Production Tax Credit Program, a state-level program aimed at creating and maintaining industry jobs, primarily below-the-line. The program is also key to New York City's competition with other North American film and television production hubs that offer similar credits, most notably Los Angeles, Atlanta, and Vancouver as well as the neighboring states of New Jersey and Connecticut. Over 30 states currently offer film production incentives. Film and television producers have noted that the presence and scope of state tax credits is a key consideration when deciding whether to locate production in a given city.

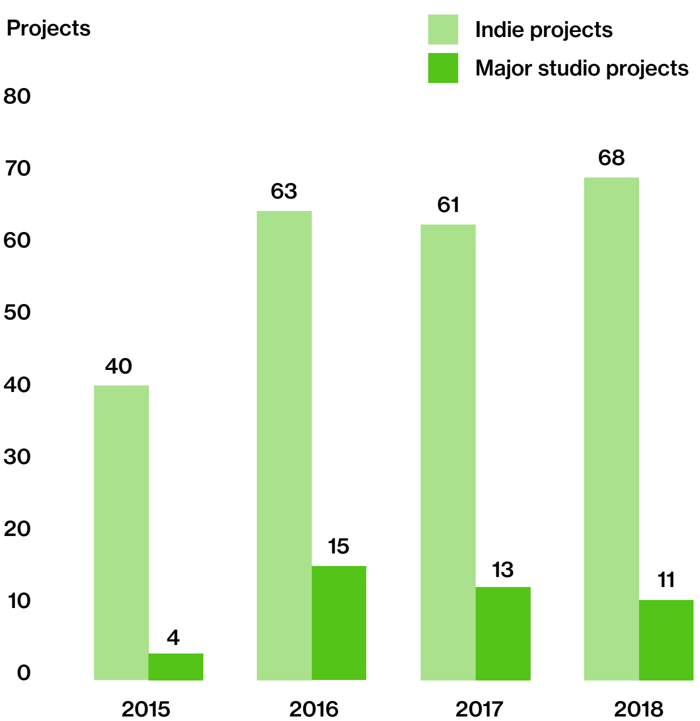
**Defining above-the-line and below-the-line**

**Above-the-line (ATL)** refers to the people with creative control over a film or television show, a group usually limited to directors, producers, writers, and actors.

**Below-the-line (BTL)** refers to the people who execute that creative vision, including line producers, set designers, lighting designers, camera operators, and myriad other roles. The vast majority of the film and television workforce is below-the-line.

Figure 8.

## NUMBER OF FILM PRODUCTIONS IN NYC RECEIVING NYS FILM PRODUCTION TAX CREDIT (BY FILM PRODUCTION TYPE)




Source: New York State Empire State Development 2015-2018, Buro Happold analysis

New York City is also home to one of North America's most robust motion picture and video production workforces. This workforce features strong representation of both above-the-line and below-the-line talent, constituting about one-third and half of jobs in the motion picture and video production sector, respectively. Industry professionals note that New York City is one of only a handful of cities worldwide where productions do not necessarily have to fly their cast (and sometimes crews) in and out – a major production cost in secondary cities. Not only does this benefit productions' bottom lines, but producers can be confident that they are working with some of the best talent in the industry.

Table 3.

## TOP 5 OCCUPATIONS IN MOTION PICTURE & VIDEO PRODUCTION

| OCCUPATION | APPROX-IMATE NUMBER OF JOBS | PERCENT OF SECTOR JOBS | TYPICAL ENTRY LEVEL EDUCATION |
|---|---|---|---|
| Producers and Directors | 10,600 | 23% | Bachelor's degree |
| Film and Video Editors | 3,800 | 8% | Bachelor's degree |
| Actors | 2,800 | 6% | Some college, no degree |
| Audio and Video Equipment Technicians | 1,800 | 4% | postsecondary nondegree award |
| Production, Planning, and Expediting Clerks | 1,500 | 3% | high school diploma or equivalent |

Source: Emsi 2019 QCEW and SE jobs, Buro Happold analysis

Much of New York City's motion picture and video production workforce is unionized, helping to ensure good wages, benefits, and safer workplaces for represented professionals. In 2019, the average annual wage in the motion picture and video production sector was $101,000, compared to a city average of $91,000. Despite having a higher average wage, the sector's wages have grown at an annual rate of 1 percent since 2004, slower than the city average of 2 percent. The sector's above-the-line occupations are represented by the Screen Actors Guild – American Federation of Television and Radio Artists (SAG-AFTRA), the Producers Guild of America (PGA), the Directors Guild of America (DGA), and the Writers Guild of America, East (WGAE). Below-the-line occupations are represented by the International Alliance of Theatrical Stage Employees (IATSE).

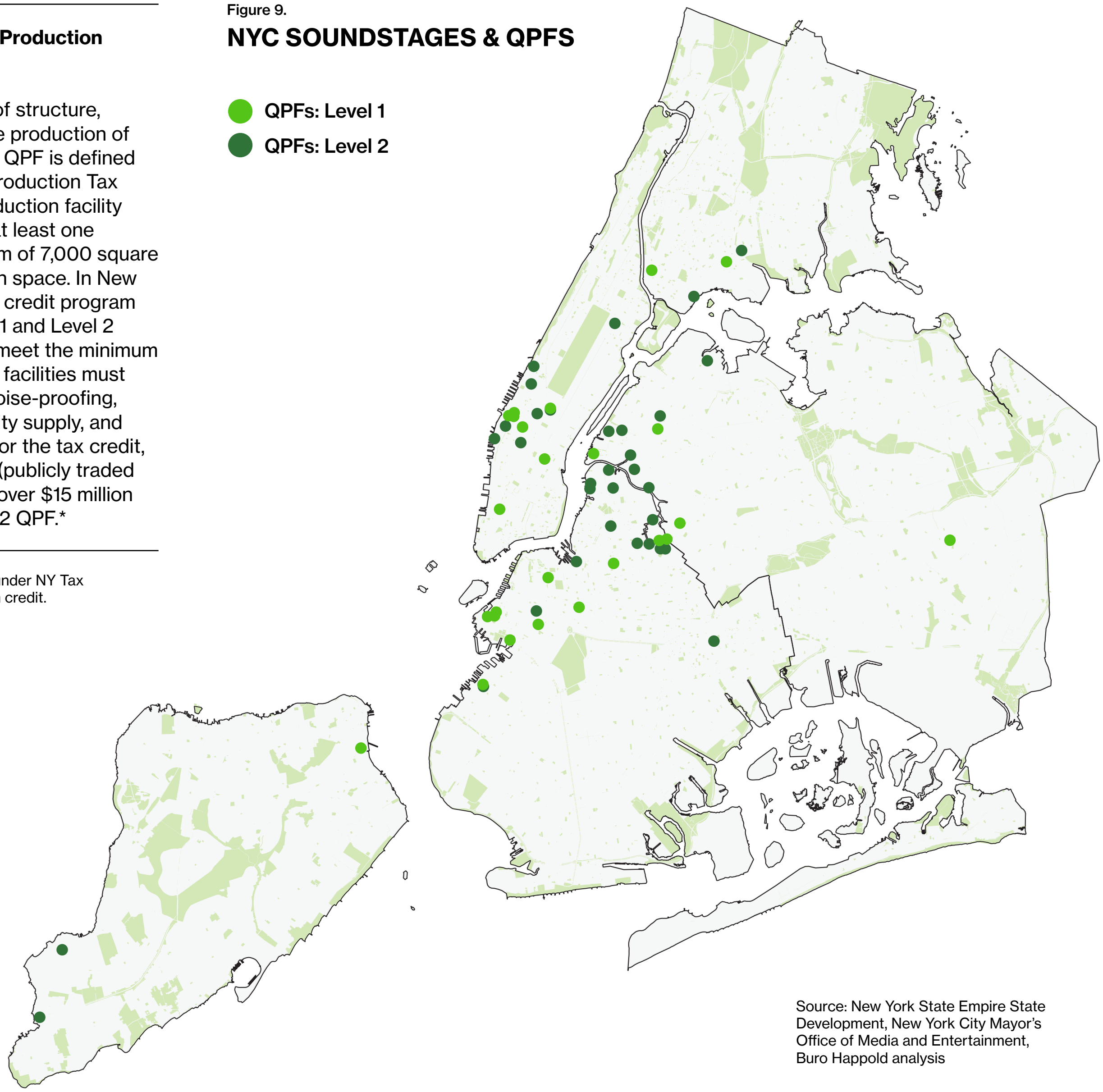
**Soundstages and Qualified Production Facilities (QPFs)**

A soundstage is a soundproof structure, building, or room used for the production of film and television content. A QPF is defined in the New York State Film Production Tax Credit program as a film production facility in the state, which contains at least one soundstage having a minimum of 7,000 square feet of contiguous production space. In New York City specifically, the tax credit program distinguishes between Level 1 and Level 2 QPFs: Level 1 facilities must meet the minimum size requirement and Level 2 facilities must meet additional criteria for noise-proofing, temperature control, electricity supply, and height clearance. To qualify for the tax credit, films made by major studios (publicly traded companies) or with budgets over $15 million must be produced in a Level 2 QPF.*

* More details on QPFs can be found under NY Tax Law § 24, Empire state film production credit.

Figure 9.

**NYC SOUNDSTAGES & QPFS**




Source: New York State Empire State Development, New York City Mayor's Office of Media and Entertainment, Buro Happold analysis

New York City is also home to almost 60 qualified production facilities – making up about 1.8 million square feet of production space – located in all five boroughs though primarily concentrated in Manhattan, Brooklyn, and Queens. These facilities vary in type and size: a handful are very large, multi-stage facilities widely regarded as world-class film and television production hubs; most others are smaller, single- or several-stage facilities. Together these facilities host much of the city's filming activity, alongside the more than 11,000 permitted location shoots that occur annually across the five boroughs.* Both soundstages and location shoots are important drivers of local economic activity.

* Location shooting refers to filming a film or television production in a real-world setting, such as a city street. MOME issued an average of 11,000 shooting permits every year between 2012 and 2019.

Crews spend production budgets and their personal incomes at local businesses from dry cleaners to coffee shops. And after production has finished, location shoots can turn modest businesses and city features into cultural icons; for example Tom's Restaurant from *Seinfeld* or the step street in Highbridge in the Bronx, now called the "Joker Stairs" after their starring turn in the 2019 film *Joker*.

All of these strengths have contributed to significant growth in New York City's motion picture and video production sector. Between 2004, when the Film Production Tax Credit was introduced, and 2019, jobs in the sector grew at an annual rate of 5 percent, much higher than the industrywide and citywide annual growth rates of 3 and 2 percent over the same period, respectively. The number of jobs in the sector had previously been declining year over year prior to 2004.

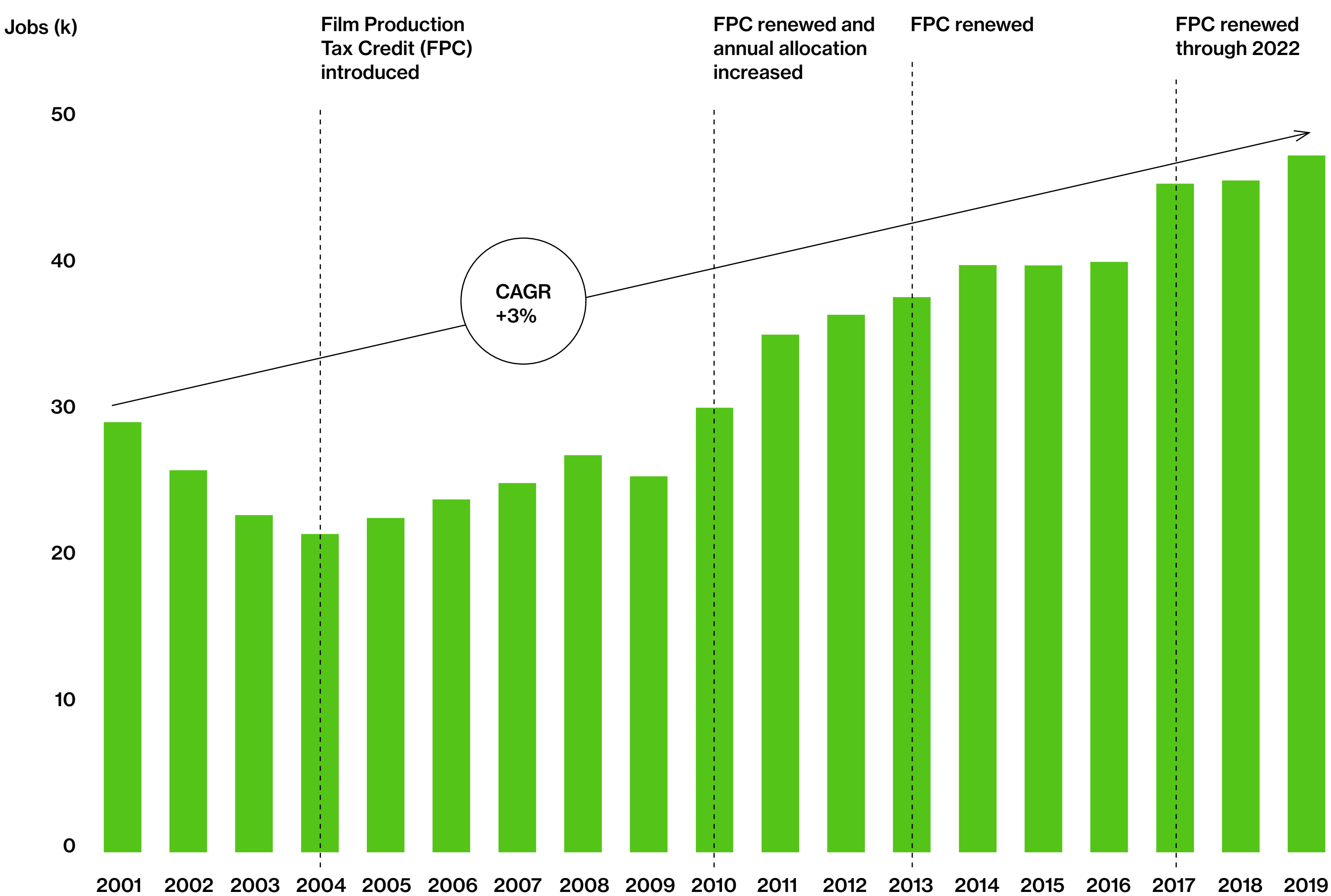
The industry's rapid job growth can be attributed primarily to the interplay between two factors: the introduction of the New York State Film Production Tax Credit coupled with changing norms in television production. The Film Production Tax Credit began in 2004 as an effort to bolster flagging economic activity in New York State following the September 11th, 2001 terrorist attacks; the program facilitated an immediate increase in film and television production and employment. Initially, the State allocated $25 million to the Film Production Tax Credit annually, crediting productions for 10 percent of their eligible costs (primarily below-the-line expenses such as salaries for crew members and expenses for facilities, props, set construction, and makeup and wardrobe, and other production costs).

**Soundstages as drivers of local economic development**

Soundstages propel local economic activity, as productions rely on numerous local businesses – lumberyards for set construction, dry cleaners to maintain costumes – while casts and crews frequent nearby services. Café Grumpy was founded in 2005 as a local coffee shop in Greenpoint, Brooklyn; brisk business from nearby Broadway Stages soon helped it expand into a national chain. In Astoria, Queens, Kaufman Astoria has invested in residential real estate – greater population density helps support more services, a boon to the soundstage workforce – and has bought disused retail, warehouse, and manufacturing spaces to repurpose as soundstages. Indeed, across the outer boroughs, soundstages have been instrumental in revitalizing New York City's stranded industrial assets. Silvercup Studios took over the Silvercup Bakery bread factory in 1983. In 2004, Steiner Studios jump-started the revival of the City-owned Brooklyn Navy Yard, which now supports over 450 businesses employing 11,000 New Yorkers. And the trend towards industrial revitalization continues; in 2020, newly-founded soundstage developer Wildflower Studios purchased the 5-acre Steinway piano factory in Queens. As one industry professional put it, "film production is the new manufacturing."

Figure 10.

**MOTION PICTURE & VIDEO PRODUCTION JOBS OVER TIME (2001 – 2019)**




Source: Emsi 2001–2019 QCEW and SE jobs, Buro Happold analysis

Building on the program's early success, the State expanded the credit to 30 percent of eligible costs in 2008 and in 2010, expanded the program's budget to $420 million annually. The New York State Commercial Tax Credit and Post-Production Tax Credit programs were also introduced in 2010. In 2013 and 2017, the Film Production Tax Credit program was renewed on a five-year timeframe, a decision that enabled producers, particularly television producers with multi-year production timelines, to commit to production in New York State long-term. In 2019, New York State expanded eligible expenses for the Film Production Tax Credit to include television writers' and directors' fees and salaries. More recently, however, New York State's 2020 budget reduced the Film Production Tax credit programs to 25 percent of eligible expenses and extended the credit's sunset to 2025, after which the program's future is yet to be determined.[2]

The second major driver of motion picture and video production job growth in New York City has been the changing nature of television production. Traditionally, producers of television series filmed a pilot episode, which, if picked up by a broadcast or cable television network, would be developed into a full season produced at a rate of one episode per week over a period of 22 weeks, with a hiatus over the summer. However, the rise of "prestige TV" and original content on internet-based streaming platforms – trends explained in greater detail in the subscription programming section – have upended that model, as cable networks and streaming platforms aim to release new television series regularly over the course of each year. Full-season production of series is now commonplace and entire seasons of "bingeable" television are released all at once on streaming platforms. Indeed, between 2015 and 2018, there were fewer than 50 pilots in NYC receiving tax credits, compared with the production of almost 200 full television seasons receiving the credits. This increasingly common television production model minimizes the seasonality and uncertainty (if a pilot does not get picked up, for example) that was once inherent to television production. The production of more full seasons year-round has helped create more consistent, high-wage employment opportunities in the sector.

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**Orange is the New Black**

In 2019, Netflix announced that *Orange is the New Black* was its most-watched original program of all time, with over 105 million households worldwide having watched at least one episode. The jailhouse dramedy was filmed in New York City with locations shoots across New York State, including the Suffolk County Jail and Hempstead House on Long Island and the Rockland Psychiatric and Children's Psychiatric Centers upstate.

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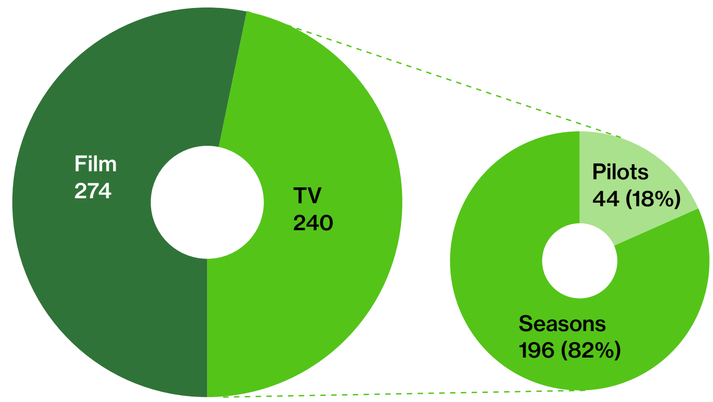
Figure 11.

**TOTAL NUMBER OF TELEVISION PRODUCTIONS IN NYC BETWEEN 2015–2018 RECEIVING NYS FILM PRODUCTION TAX CREDIT (BY PROJECT TYPE)**




Source: New York State Empire State Development 2015–2018, Buro Happold analysis

The changing nature of television production is further reflected in the fact that local spending and hiring by television productions far exceeds that of films on an annual basis – despite the fact that roughly the same number of films as television shows receive tax credits each year. Furthermore, while the number of tax credit-receiving television productions produced in New York City has remained relatively stable since 2016, the amount of local spending and hiring by television productions has increased year-over-year, reflecting the race for ever-higher production values that has come to define the medium.

When HBO debuted *Boardwalk Empire* in 2010, its production budget seemed extravagant, with $20 million for the pilot and $5 million for each subsequent episode. Yet television shows produced since then make earlier budgets look modest, particularly high-production-value period dramas like *The Deuce* ($12 million per episode), *The Get Down* ($11 million per episode), and *Vinyl* ($7 million per episode with a $30 million pilot).[3] Indeed, in 2018, whereas 78 film productions receiving tax credits in New York City spent a significant $389 million and hired 34,000 locally, 70 television productions spent $2.6 billion and hired 167,000 locally.*

Television's higher local spending and hiring is also due to the dominance of independent film within New York City's filmmaking scene, as independent films are generally produced on a smaller budget than studio-backed films; in

* The number of hires by film and television productions differs from the number of jobs in the sector. Individuals with jobs in the sector are often hired by multiple different productions annually. Therefore, the number of hires by productions is much higher.

**Biggest-budget television series in New York receiving NYS Film Production Tax Credit since 2015**

| PRODUCTION | NYS SPEND | NYS HIRES |
|---|---|---|
| The Get Down – Season 1 | $149 MILLION | 5,500 |
| Gotham – Season 2 | $111 MILLION | 4,800 |
| Vinyl – Season 1 | $105 MILLION | 5,400 |

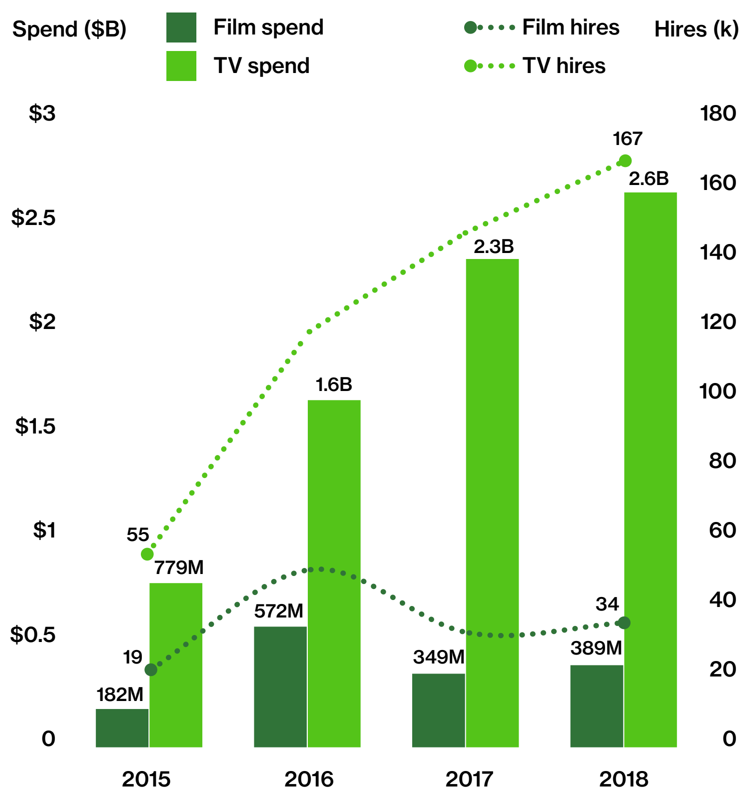
Source: New York State Empire State Development 2015-2018

2018, the average film production in New York City had a local spend of $4.5 million, compared with the average television production's local spend of $34 million.

The motion picture and video production sector's rapid growth has brought with it some changes in the sector's distribution across the city. Jobs in the sector have historically been concentrated in Manhattan, where most production companies are located; in 2019, 88 percent of jobs in motion picture and video production were based in Manhattan, down from 96 percent in 2001. This is because the outer boroughs, particularly Brooklyn and Queens, have also experienced considerable growth in motion picture and video production jobs. Between 2001 and 2019, motion picture and video production jobs grew across the city at an average annual rate of 3 percent, with exceptional growth rates in Brooklyn (9 percent)

Figure 13.

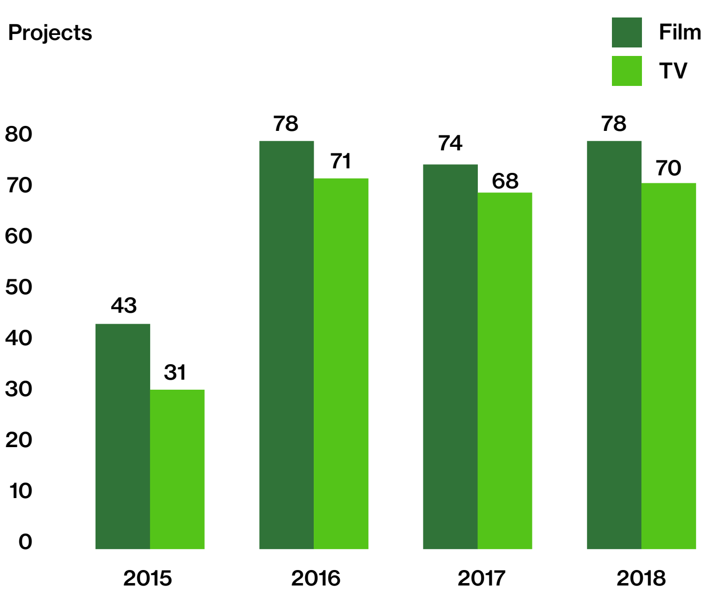
## TOTAL SPEND & HIRES BY FILM & TELEVISION PRODUCTIONS IN NYC RECEIVING NYS FILM PRODUCTION TAX CREDIT




Source: New York State Empire State Development 2015-2018, Buro Happold analysis

Figure 12.

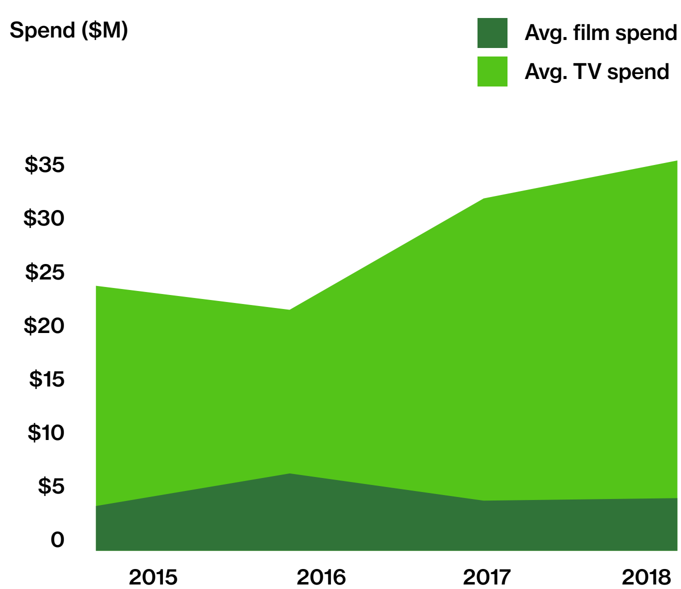
## NUMBER OF FILM & TELEVISION PRODUCTIONS IN NYC RECEIVING NYS FILM PRODUCTION TAX CREDIT*




* Each film, television series, and pilot are counted as one production.
Source: New York State Empire State Development 2015-2018, Buro Happold analysis

Figure 14.

## AVERAGE SPEND PER FILM & TELEVISION PRODUCTION IN NYC RECEIVING NYS FILM PRODUCTION TAX CREDIT




Source: New York State Empire State Development 2015-2018, Buro Happold analysis

### Soundstage expansions

As film and television production in New York City grows, so too does competition for soundstage space. Established soundstage operators and newcomers, namely production companies, are increasingly opening new soundstages to keep up with demand.[4]

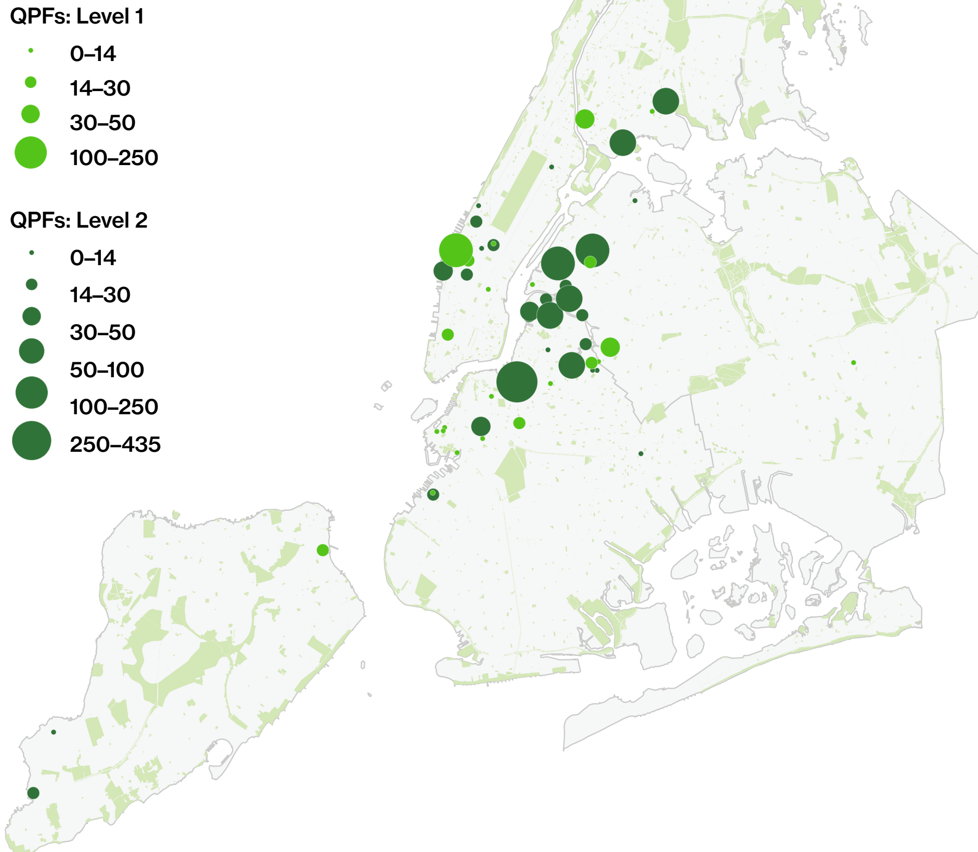
- Silvercup North: 115k sf, 295 Locust Avenue, Bronx, opened 2016
- Broadway Stages: 67-acre Arthur Kill Correctional Facility, Staten Island, opened 2017
- Broadway Stages: 23.5k sf, 45-10 19th Ave, Astoria, plans announced 2020
- Broadway Stages: 180k sf, 277 Monitor Street, Brooklyn, opened 2016
- Kaufman Astoria: 150k sf addition, plans announced 2019
- Steiner Studios Made in NY production facility: 500k sf, Bush Terminal, Brooklyn, plans announced 2020
- York Studios (new studio): 170k sf, 1410 Story Ave, Bronx, plans announced 2019
- Netflix production facility (new studio): 131k sf, 333 Johnson Ave, Brooklyn, plans announced 2019
- Wildflower Studios (new studio): 650k sf, 87 19th Ave, Astoria, plans announced 2019

### NYC Film Green

NYC Film Green, launched in 2016, encourages film and television productions to engage in sustainable practices. Productions that enrol in the program track their sustainability efforts and receive a Film Green mark of distinction if they successfully meet sustainability benchmarks. The program incentivizes productions to reduce their environmental impact by giving them an opportunity to receive recognition for their efforts.

Figure 15.

**NYC SOUNDSTAGES & QPFS (BY THOUSANDS OF SQUARE FEET)**




Source: New York State Empire State Development, New York City Mayor's Office of Media and Entertainment, Company websites, Buro Happold analysis

and Queens (8 percent), reflecting in part the expansion of soundstages and production facilities in the city's outer boroughs.

As film and television production continues to boom and demand for production space in the city soars, soundstages have expanded their footprints, largely in the city's less dense outer boroughs. As of 2020, New York City was estimated to have about 1.8 million square feet of QPF capacity, with significant growth underway. Established soundstage operators such Broadway Stages, Silvercup, Kaufman Astoria, York, and Steiner Studios have plans to add hundreds of thousands of square feet of additional production space in Brooklyn, Queens, and the Bronx. The City's Made in New York Campus in Sunset Park, Brooklyn will add half a million square feet of production space when it opens in 2022.

This expansion is expected to continue, as established operators and relative newcomers to the sector announce plans to open more production spaces in the city. Unlike in other production hubs such as Los Angeles, where soundstages tend to be owned and operated by production companies, New York City's soundstages tend to be owned and operated by commercial real estate developers with the notable exception of Netflix, which plans to open a production facility in Williamsburg, Brooklyn in 2021.

### Made in NY Campus

The Made in NY Campus at Bush Terminal, set to open in 2022, will provide a new use for the transitioning Bush Terminal, a former oil refinery turned shipping terminal in Sunset Park, Brooklyn. Taking its name from the Mayor's Office of Media and Entertainment suite of programs, which also includes training in film and television professions for underemployed New Yorkers, the 36-acre campus will house garment manufacturing, light industry, and, most notably, film and television production: a 500,000 square foot 8-stage facility operated by Steiner Studios. The production facility is expected to provide 2,200 full-time jobs, including on-set construction, costume design, electrical work, and other aspects of production. As part of its agreement with the City, Steiner Studios also plans to develop Bush Terminal Piers Park, a waterfront park adjacent to the production facility. The project represents a major investment on the part of the City in infrastructure and job growth and reflects motion picture and video production's central role in shaping the city's future.

# TALENT

New York City's film and television talent sector consists primarily of independent and freelance individuals in above-the-line occupations, such as writers, actors, producers and directors, and, to a lesser extent, below-the-line freelancers.* These individuals, alongside the industry's agents, managers and educational institutions, form a large and vibrant ecosystem that contributes to a critical mass of creative activity in New York City – one that drives the creation of film and television content. Artists and creatives the world over move to the city to be a part of this community, and ultimately stay in part thanks to the city's supporting infrastructure and institutions. The New York University Tisch School of Arts and Columbia University School of the Arts, for example, are widely regarded as some of the best film schools in the world, giving them an important role in fostering and retaining the city's talent. Public institutions, such as the Fierstein Graduate School of Cinema (the opening of which MOME helped fund as the first public film school in the nation on a working film lot), also train talented creatives and help broaden access to the industry.

In 2019, the talent sector was directly responsible for:

**7,500**
jobs
(7 percent of direct industry jobs)

**$646 MILLION**
in wages
(5 percent of direct industry wages)

**$3.5 BILLION**
in economic output
(5 percent of direct industry output)

* Note that this does not include individuals, whether above-the-line or otherwise, that are employed by businesses in other sectors. Directors employed in motion picture and video production, for example, are counted as being part of motion picture and video production in so far as they are on the payroll of a business or sole proprietorship that self-classifies under that sector.

Production of *Gotham* series. Image courtesy of Warner Bros. Entertainment.

'Independent talent' alone accounts for over 70 percent of these jobs, and within 'independent talent', the vast majority of jobs are held by individuals with above-the-line occupations. Since the film and television industry is only part of New York City's enormous arts, media, and entertainment universe, these creative professionals have the opportunity to practice and refine their crafts in a variety of contexts: film actors can perform on Broadway stages, screenwriters can pilot jokes at stand-up comedy clubs, and costume designers can work in fashion.

Table 4.
**TOP 5 OCCUPATIONS IN 'INDEPENDENT TALENT'**

| OCCUPATION | APPROX-IMATE NUMBER OF JOBS | PERCENT OF SECTOR JOBS | TYPICAL ENTRY LEVEL EDUCATION |
|---|---|---|---|
| Writers | 3,300 | 60% | Bachelor's degree |
| Actors | 900 | 17% | Some college, no degree |
| Producers and directors | 400 | 7% | Bachelor's degree |
| Multimedia artists and animators | 300 | 6% | Bachelor's degree |
| Audio and video equipment technicians | 200 | 4% | postsecondary nondegree award |

Source: Emsi 2019 QCEW and SE jobs, Buro Happold analysis

This inter-industry cross-pollination is a defining characteristic of New York City's arts, media, and entertainment industries and drives their dynamism and vibrancy. Indeed, film and television producers have noted that New York City is a particularly inspiring place to work because many creative professionals draw on a breadth and depth of experience from other industries and creative pursuits that is not as commonly found elsewhere. This inter-industry fluidity supports long and varied careers for some creative professionals, as demonstrated by the fact that one-third of jobs in 'independent talent' are held by individuals over the age of 55, much higher than the film and television industry and New York City averages of 19 and 22 percent, respectively.

**Spotlight – Television Writers**

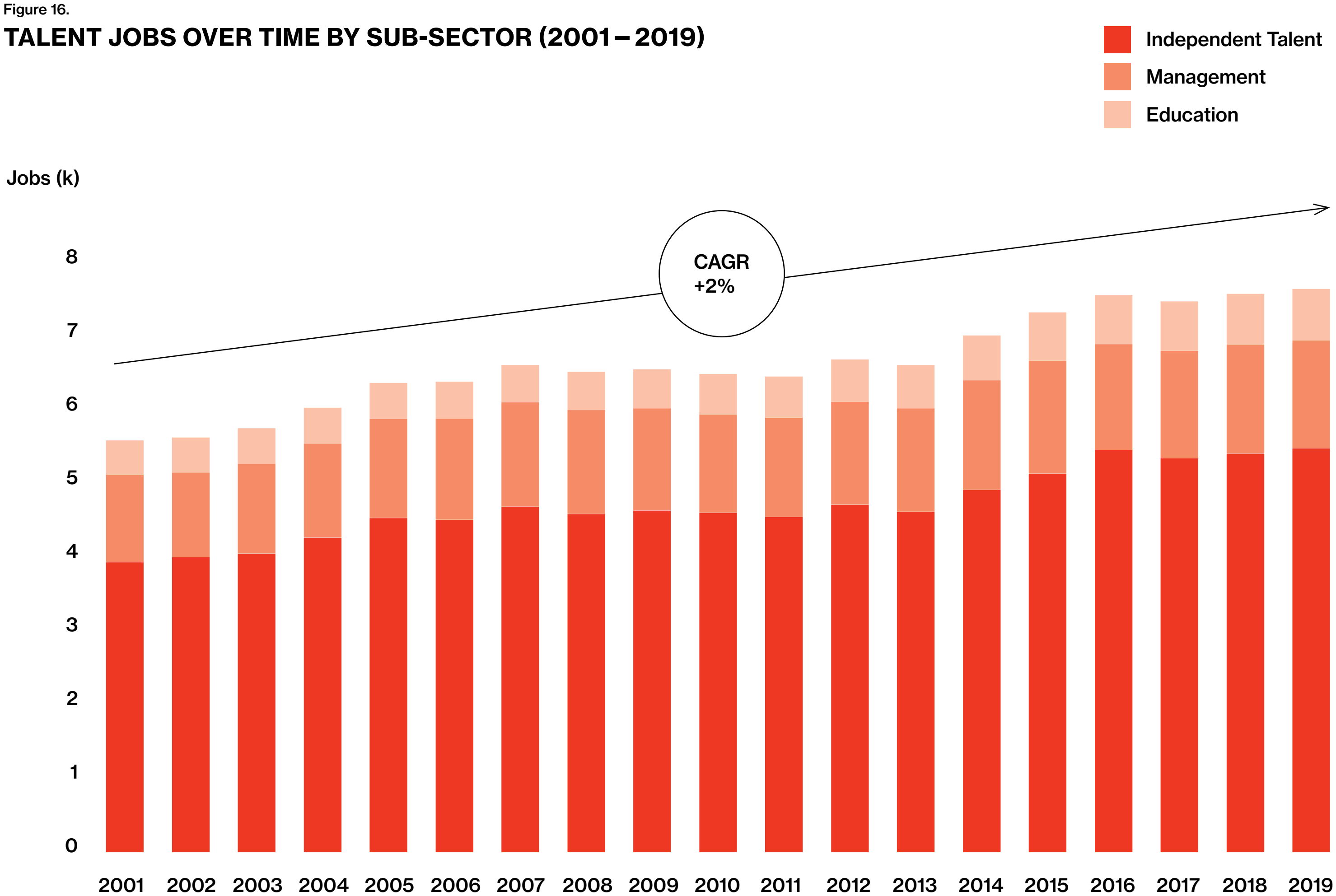
According to the Writers Guild of America East, over half of New York City's film and television writers also work as playwrights, journalists, and novelists. Writers on *The Americans*, a critically acclaimed FX series produced in New York City from 2013 to 2018, included Melissa James Gibson, whose play *Placebo* debuted at Playwrights Horizon in 2015, Stephen Schiff, a former staff writer for *The New Yorker,* and Tracey Scott Wilson, whose show *Buzzer* played at the Public Theater in 2015, the same year she was nominated for a Writers Guild Award for her work on *The Americans*. Attica Locke, a writer for Fox's *Empire*, wrote his award-winning 2018 novel *Bluebird, Bluebird* in the break between seasons. And in March 2020, playwright Jeremy O. Harris signed a two-series production deal with HBO, shortly after his breakout hit *Slave Play* ended its run on Broadway.[5]

Historically, job growth in the talent sector has roughly kept pace with citywide job growth, though in recent years, talent jobs grew slightly slower, increasing at annual rate of 2 percent between 2014 and 2019 compared with a citywide rate of 3 percent. This trend reflects the modest yet consistent increase in job opportunities for freelancers–such as actors, musicians, and costume designers – in the film and television industry, as well as the growing number and strength of the industry's educational institutions.

Whereas the vast majority of jobs in this sector are located in Manhattan, new job growth is fastest in the city's outer boroughs, particularly in Brooklyn. This reflects two

Figure 16.

**TALENT JOBS OVER TIME BY SUB-SECTOR (2001 – 2019)**




Source: Emsi 2001-2019 QCEW and SE Jobs, Buro Happold analysis

broader trends. First is the growth of the motion picture and video production sector – a key source of employment for freelance above-the-line talent – in the outer boroughs. Second is the recent expansion of film and television-related educational institutions, particularly in Brooklyn. Fierstein Graduate School of Cinema was founded as part of Brooklyn College in 2015, the same year that Pratt, a renowned private institution also in Brooklyn, unveiled a new multi-million-dollar Film and Video Department building.[6] However, while training programs and the city's higher education institutions foster a robust pipeline for creative and technical talent, industry professionals have noted difficulty in hiring for business-oriented roles such as in production accounting or management.

Wage growth in the talent sector has also roughly kept pace with citywide wage growth, slightly outpacing the citywide average in recent years, having increased at an annual rate of 3 percent between 2014 and 2019 compared to the citywide rate of 2 percent. However, despite increasing over time, the average annual wage in the talent sector is $90,000 and remains relatively low compared to the film and television industry average, though is still on par with the city average of $91,000. Within the sector, the average annual wage is lowest for 'independent talent' at $80,000. The uncertainty of consistent income poses a challenge to freelance creative professionals choosing to locate here given the city's high cost of living, and likewise poses a challenge to the city, which faces competition from cities with lower costs of living that are also vying to attract and retain talent.

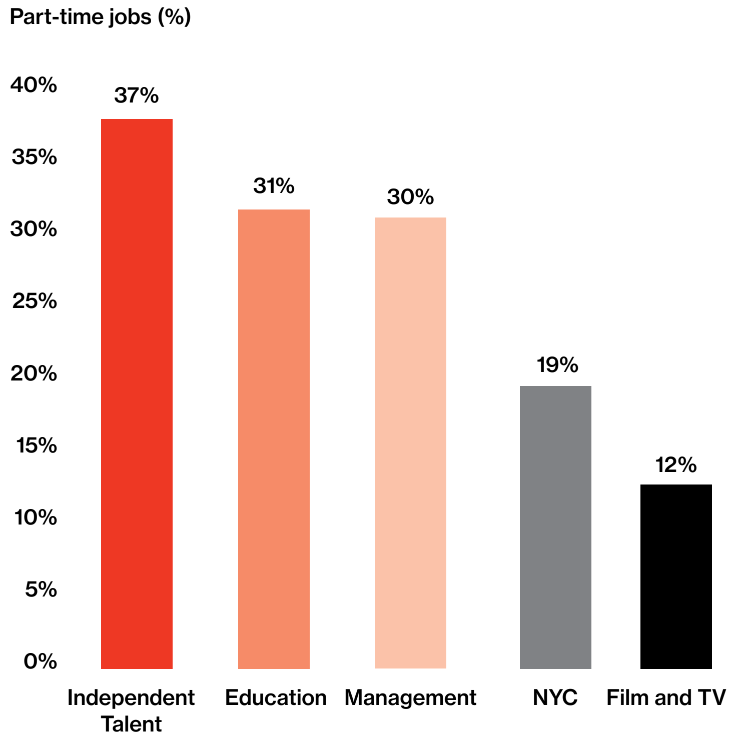
The prevalence of part-time work is a key characteristic of the talent sector that can limit industry access for some.* About one-third of jobs in the sector are part-time, which is far higher than the industry and city averages of 12 and 19 percent, respectively. In 'independent talent', where almost 40 percent of jobs are part-time, the flexibility afforded by part-time work can be an asset to some freelancers. However, it can also be a source of financial precarity for others and ultimately a barrier to a sustainable career in the industry. In the case of the education subsector, the city's fine arts schools tend to primarily employ part-time adjunct instructors, which can be a boon for faculty who want to simultaneously work in their creative fields. However, it can just as easily be a limiting factor for those seeking stability in full-time academic positions.

**NYC Educational Institutions**

New York City's educational institutions have long trained some of the industry's most esteemed film and television professionals. Fiorello H. LaGuardia High School, a public high school for music, dance, and performing arts, has educated Hollywood stars from Al Pacino to Nicki Minaj, and inspired the 1980 movie *Fame*. At the university level, institutions including New York University, Columbia University, Parson's School of Design, and Brooklyn College offer their students a world-class education and the chance to take part in New York City's thriving and diverse artistic community. NYU graduates include artists who work across theatre, screen, and voice acting such as Idina Menzel and Raúl Esparza, as well as Oscar-winner Chloe Zhao, who in 2021 became only the second woman to win the Best Director award. The first, Katherine Bigelow, went to Columbia.

Figure 17.

## PERCENT OF PART-TIME TALENT JOBS BY SUB-SECTOR (2019)




Source: American Community Survey Public Use Microdata Sample 2018, Emsi 2019 QCEW and SE jobs, Buro Happold analysis

* Defined as less than 35 hours per week.

# SUBSCRIPTION PROGRAMMING

New York City is a hub for subscription programming companies, home to many of the nation's most influential and successful cable networks and subscription programmers. Virtually all subscription programming companies in the city are joint ventures or wholly owned subsidiaries of multinational mass media and entertainment conglomerates, of the likes of WarnerMedia and The Walt Disney Company. Although parsing these corporate subdivisions and activities is complicated, this study treats only the companies (and arms of companies) that are directly engaged in subscription programming as being part of this sector. A&E Networks, Fox News Channel, and Home Box Office (HBO) are a few examples of the major subscription programming companies headquartered in New York City that are included in this sector.

In 2019, the subscription programming sector was directly responsible for:

**7,600**
jobs
(8 percent of direct industry jobs)

**$1.7 BILLION**
in wages
(14 percent of direct industry wages)

**$27.6 BILLION**
in economic output
(43 percent of direct industry output)

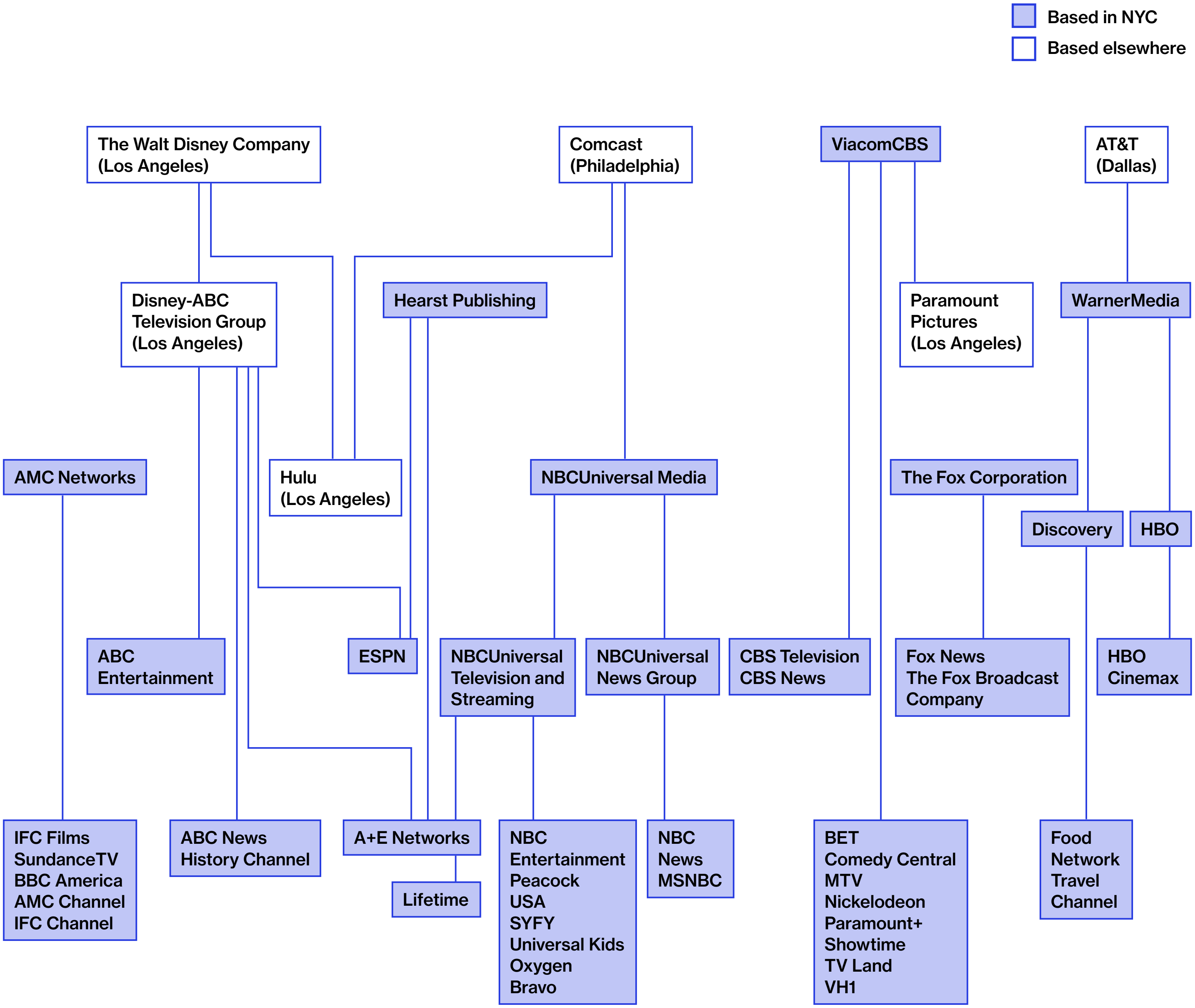
Production of *Almost Perfect* (2011). Image courtesy of the Cinematographers Guild, Local 600.

Subscription programming is the financial engine of New York City's film and television industry, contributing over 40 percent the industry's direct economic output despite accounting for only 8 percent of its direct jobs. This outsized economic output is due in part to the consolidated revenues of corporations with multiple subscription programming holdings. The cable networks and other subscription programming companies that make up the sector reap tens of billions of dollars in subscription revenue annually and their New York City operations consist primarily of corporate offices that host multiple companies under one corporate parent. For instance, the Fox Corporation draws revenue from both Fox News and Fox Broadcasting; and AMC Networks owns the AMC channel, BBC America, IFC films, and other media outlets.

Furthermore, subscription programming companies in New York City fund a significant amount of film and television content production and have therefore long been at the vanguard of industry developments. In the early 2000s, cable networks such as HBO and AMC began pioneering programming that broke free of television's established storytelling strictures. New York City was soon producing the programs that have come to define "prestige TV": *The Sopranos, Mad Men, Boardwalk Empire, Mr. Robot*. As other cable networks and later, streaming platforms, joined the trend, television production values soared in a race to capture both viewers and critical acclaim.

Figure 18.

## REPRESENTATIVE NEW YORK CITY MEDIA LANDSCAPE AS OF 2020[7]




Source: Buro Happold analysis

Today, New York City's subscription programming sector has spearheaded the formation of new internet-based distribution platforms as it vies to compete with the subscription-based streaming services of companies like Netflix and Amazon. WarnerMedia's HBO Max, NBCUniversal's Peacock, and ViacomCBS' Paramount+ all launched in the last year and distribute content from their corporate parents' subsidiaries. As such, a key contributing factor to the development of these new platforms has been the consolidation of subscription programming and other media companies under a few corporate parents.

Media companies have been consolidating for decades, incentivized by increased profit-margins and reduced risk, and enabled by federal deregulation. In 1983, 50 companies owned 90 percent of the media consumed by Americans. By 2012, just six companies controlled that same 90 percent.[8] New York City has long been at the center of this trend, and the city's media and entertainment conglomerates have fostered large and diverse stables of holdings, cable networks among them, via mergers and acquisitions.

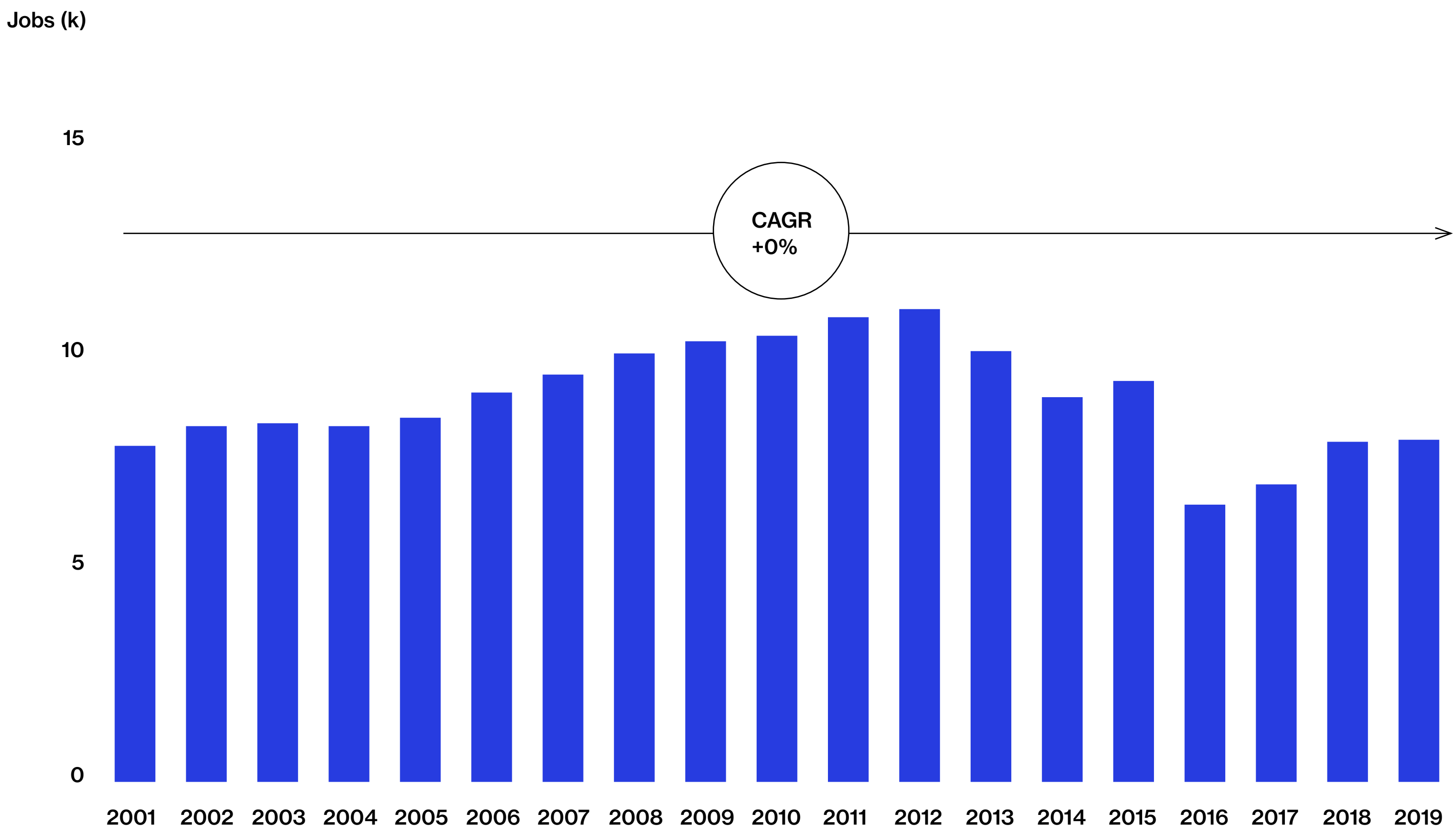
While consolidation has boosted revenues in subscription programming (between 2012 and 2019, the sector's economic output increased by almost 50 percent), it has also led to a reduction in direct employment. Between 2012 and 2019, the number of subscription programming jobs contracted at an annual rate of -5 percent, compared with growth in film and television industry and citywide jobs at a rate of 2 percent for both over the same period. This is in part due to the workforce downsizing that occurs when companies' roles and functions become redundant in mergers and acquisitions. It is worth noting, however, that jobs in the sector have experienced an uptick since 2016.

Jobs in subscription programming remain the highest paying in the industry, with an average annual wage per job of $222,000, more than double the citywide average and a reflection of the high concentration of corporate offices, executives, and well-paid staff in New York City. Between 2012 and 2019, the sector's average wage grew at an annual rate of 6 percent, compared to the citywide rate of 2 percent.

The sector's corporate presence has made its mark on the city through high-profile offices, primarily clustered near technology companies on Manhattan's West Side. A notable example is WarnerMedia, which currently rents 27 floors at Hudson Yards, a multi-use development that opened in 2019. Further downtown, ABC-Disney's massive complex at 4 Hudson Square, the planned location of new offices for ESPN, has been credited with revitalizing the formerly under-occupied business district. Netflix also plans to occupy 100,000 square feet of office space in the Flatiron district as it expands its New York City footprint.[9]

Figure 19.

**SUBSCRIPTION PROGRAMMING JOBS OVER TIME (2001 – 2019)**




Source: Emsi 2001-2019 QCEW and SE Jobs, Buro Happold analysis

# TELEVISION BROADCASTING

As with subscription programming, New York City has long been the television broadcasting capital of the country and is home to the nation's four largest broadcast television networks: CBS, NBC, ABC, and Fox. Referred to as the Big Four, these networks are the most watched in the country, with viewership that is orders of magnitude higher than even the most popular cable networks.

In 2019, the television broadcasting sector was directly responsible for:

**16,900**
jobs
(17 percent of direct industry jobs)

**$2.8 BILLION**
in wages
(23 percent of direct industry wages)

**$12.1 BILLION**
in economic output
(19 percent of direct industry output)

Television broadcasting is a key contributor to the film and television industry's economic and cultural impacts in New York City. In addition to being the second largest employer in the industry, the television broadcasting sector – and the Big Four broadcasters in particular – are important cultural touchstones and tourist attractions. At NBC's headquarters (nicknamed "30 Rock" for its location at 30 Rockefeller Center), live tapings and studio tours attract tourists and visitors the world over, alongside Rockefeller Center's iconic Christmas tree and ice-skating rink. Indeed, broadcast television headquarters are typically multi-purpose facilities that include both office and production spaces, many of which can host large studio audiences. Many of broadcast networks' most popular daytime programs, such as *The View* and *The Wendy Wiliams Show*, as well as a number of nightly talk shows and news programs, are filmed in the heart of Manhattan. Jobs in

Production of *#BHeard Town Hall* by BRIC TV. Image courtesy of BRIC TV.

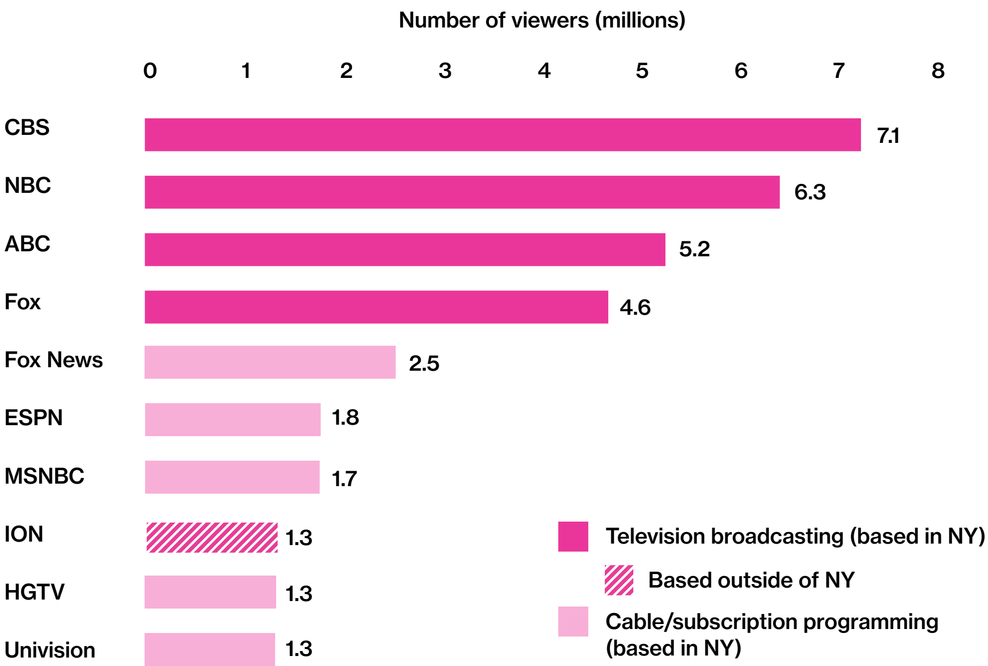
this sector are highly concentrated in Manhattan, with 98 percent of television broadcasting jobs locating there in 2019.

Hundreds of thousands of people attend live tapings in New York City annually. Audience members sign up weeks in advance to secure tickets to tapings of *Late Night with Seth Meyers* or *The Tonight Show with Jimmy Fallon*, and line up hours in advance for standby tickets to *Today* and *Saturday Night Live*. These semi-permanent lines around the block, coupled with such landmarks as the bright Broadway-style marquee at the Ed Sullivan Theater, home to *Late Night with Stephen Colbert*, further the buzz around and visibility of broadcast television live tapings and, as such, reinforce New York City's position as the premier location for this type of entertainment.[10]

Despite the number of jobs in television broadcasting remaining relatively flat since 2001, the sector continues to create thousands of high-paying jobs for New Yorkers. It has the second-highest average annual wage in the industry, at $164,000 and wage growth in the sector has outpaced that of the city overall, having grown at an annual rate of 4 percent between 2001 and 2019, double the citywide rate of 2 percent. Looking forward, television broadcasting is poised to remain a significant source of economic value for the city despite the sector facing significant headwinds nationwide due to declining viewership in recent years.

Figure 20.

## LEADING AD-SUPPORTED BROADCAST & CABLE NETWORKS IN THE US IN 2019, BY AVERAGE NUMBER OF VIEWERS[11]




Source: Buro Happold analysis

### Good Morning America

*Good Morning America* is a New York City institution. The program has been filmed every weekday morning at ABC's Times Square studio since 1999. In 2019, *Good Morning America* was the country's top-rated morning show and, according to a Hollywood Reporter poll, the "most loved" morning show among American adults. The show features news, culture, and entertainment reporting, interviews, cooking demonstrations, and celebrity guests. While the 5,000 square foot studio holds approximately one hundred audience members, hundreds more engage from outside the studio's ground floor windows, which look out onto bustling Times Square. An adjacent outdoor studio space also hosts celebrity interviews and musical performances. Visitors from around the world say hi to their moms, shout out their hometowns, and send congratulations to loved ones through signs held up behind *Good Morning America*'s anchors. The show is also a popular place to propose. Prospective husbands and wives can apply online to get engaged on air; *Good Morning America* then helps facilitate the proposal and broadcasts the surprise moment, giving the happy couple a taste of television stardom.

Figure 21.

## TELEVISION BROADCASTING JOBS OVER TIME (2001 – 2019)


Source: Emsi 2001-2019 QCEW and SE Jobs, Buro Happold analysis

# ADVERTISING & MEDIA BUYING

The critical mass of corporate activity in New York City — both within the film and television industry and beyond — supports a thriving and diverse advertising and media buying ecosystem, from multinational advertising agencies to boutique studios and specialized media buying companies. For the purposes of this study, the film and television industry's advertising and media buying sector is defined as including only the companies (and arms of companies) whose activities are directly tied to film and television, categorized according to two subsectors: 'advertising' and 'media buying.'

The 'advertising' subsector includes activities directly involved in the creation of film and television-related audio-visual advertising content such as commercials, product placements, branded content, and other motion picture advertising. The 'media buying' subsector includes activities directly involved in purchasing advertising time and space from film and television outlets, either by full-service advertising agencies, dedicated media buying agencies, or companies directly.*

Both subsectors are key elements of the film and television ecosystem, as they both play a direct role in creating and placing audio-visual advertising content in film and television programming.

* It is worth noting that these subsector definitions intentionally exclude activities related to services provided by advertising and media buying agencies to companies in the film and television industry, since these are considered business-to-business transactions and are captured in the film and television industry's indirect economic impacts.

ADR studio at Feirstein Graduate School of Cinema.
Image courtesy of Feirstein Graduate School of Cinema.

In 2019, the industry's advertising and media buying sector was directly responsible for:

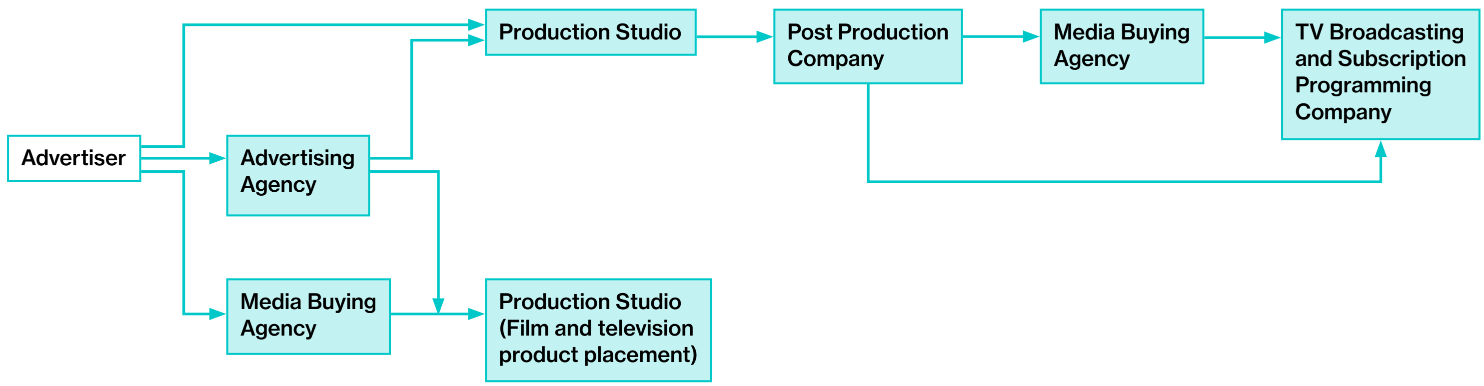
**14,300**
jobs
(14 percent of direct industry jobs)

**$1.9 BILLION**
in wages
(15 percent of direct industry wages)

**$4.4 BILLION**
in economic output
(7 percent of direct industry output)

Figure 22.

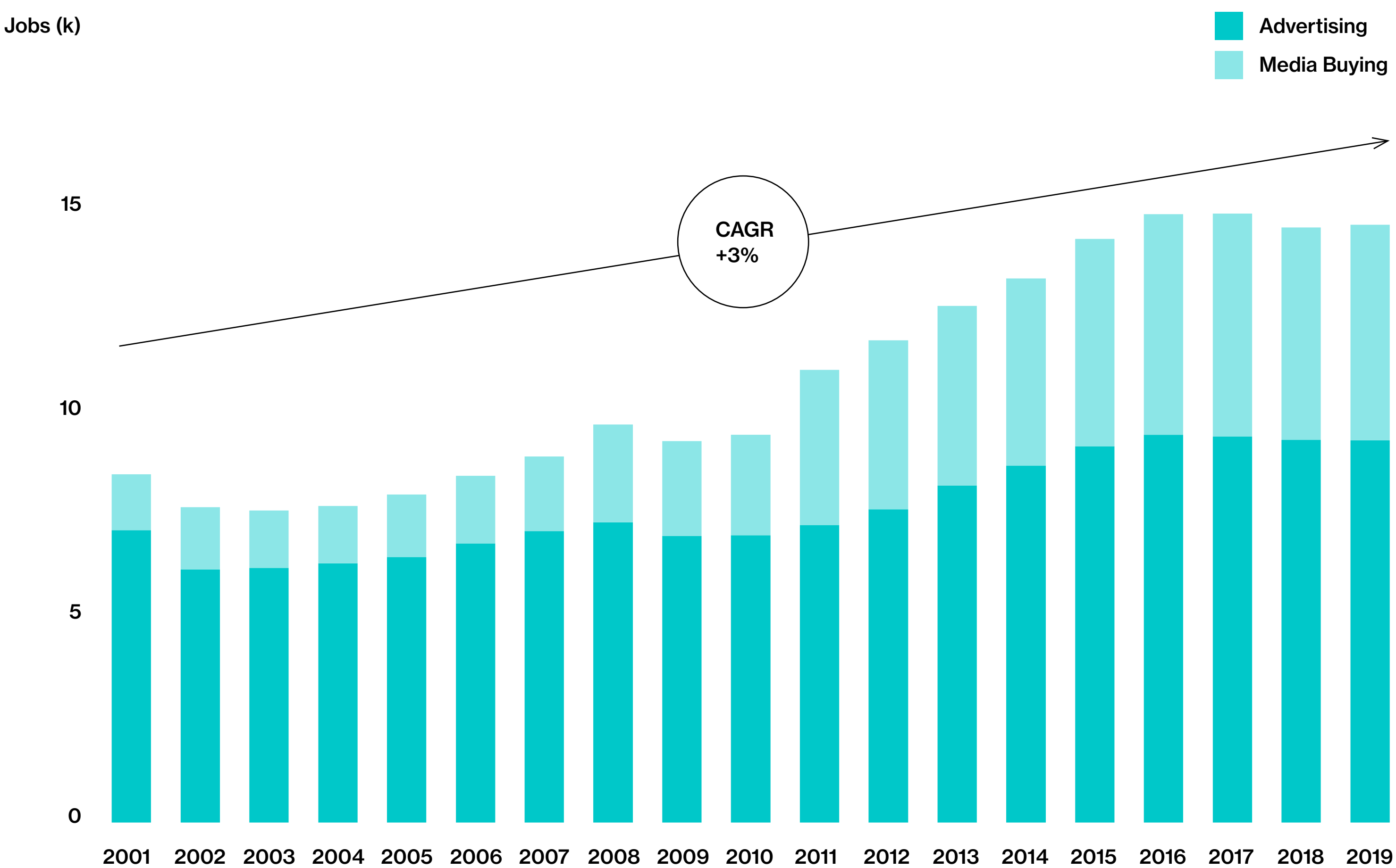
## FILM & TELEVISION COMMERCIAL VALUE CHAIN




Source: Buro Happold analysis

Figure 23.

## ADVERTISING & MEDIA BUYING JOBS OVER TIME BY SUB-SECTOR (2001 – 2019)




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

The sector is a major employer and is deeply integrated with other film and television sectors, namely motion picture and video production, talent, subscription programming, television broadcasting, and postproduction. This symbiosis is a defining feature of the city's advertising and media buying sector, for which geographic proximity to New York City's large client base and a thriving film and television ecosystem has historically been an asset. The process of creating and placing commercials, for example, requires frequent cross-sector collaboration – which is why a company like Hulu has a New York City office dedicated to advertising and media buying, even though it is headquartered in Los Angeles. Moreover, that advertising agencies tend to prefer hiring production studios in their home cities is a boon to the city's motion picture and video production sector. Residual payments from advertisements are a source of income for many creative professionals in the film and television industry, who can fill gaps in their work schedules with short commercial shoots.

**Commercial Tax Credit**

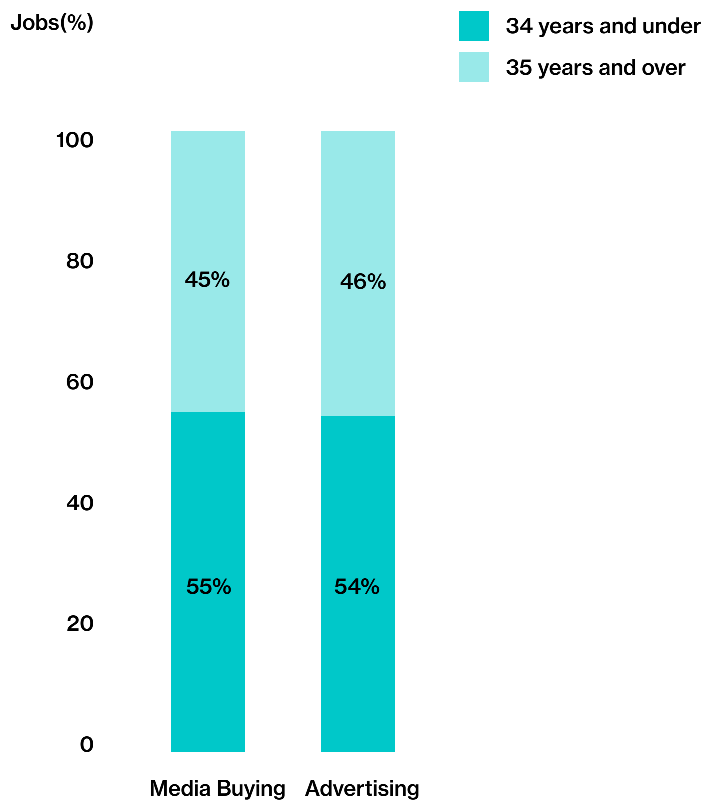
Each year, $7 million from the New York State Film Production Tax Credit's budget is earmarked for the production of commercials. In 2017, the most recent data year available, 33 production studios received tax credits towards the production of 256 commercials, which created about 12,000 jobs in New York State.[12]

Since 2001, the number of jobs in the advertising and media buying sector has grown at an annual rate of 3 percent, faster than the overall industry and citywide annual growth rates of 2 percent and 1 percent, respectively. 'Advertising' accounts for most jobs, but the sector's growth over the years has been largely driven by the 'media buying' subsector. Since 2010, the number of 'media buying' jobs has grown at the exceedingly high annual rate of 9 percent, attributable to the growing demand for television programming worldwide, which drives media buying activity in New York City.

Both subsectors provide New Yorkers with good-paying jobs. In 'advertising', the average annual wage per job is $140,000 and in 'media buying' it is $112,000. Wages in the overall advertising and media buying sector have increased at an annual rate of 2 percent since 2001, on par with the city average. Furthermore, the sector skews much younger than the industry and the city overall. In both 'advertising' and 'media buying,' over half of jobs are held by individuals 34 years old and younger, indicative of a young and dynamic sector where attention to social trends is paramount and well-paying job opportunities for young professionals abound.

Figure 24.

**ADVERTISING & MEDIA SECTOR AGE DISTRIBUTION BY SUB-SECTOR (2019)**




Source: Emsi 2019 QCEW and SE Jobs, Buro Happold analysis

# POSTPRODUCTION & OTHER SERVICES

Postproduction includes all activities that take place after filming has been completed, transforming footage into viewer-ready content. New York City's postproduction and other services sector consists of three subsectors: 'postproduction', which includes companies that provide postproduction services ("post houses" in industry parlance) such as editing, sound design, color grading, visual effects (VFX), and animation; 'other motion picture and video services', which includes companies that provide miscellaneous film and video services, such as film preservation and restoration; and 'sound recording', which includes recording studios, to the extent that they specialize in recording for film and television projects, such as for animated or dubbed content.

In 2019, the postproduction and other services sector was directly responsible for:

**3,600**
jobs
(4 percent of direct industry jobs)

**$334 MILLION**
in wages
(3 percent of direct industry wages)

**$1.1 BILLION**
in economic output
(2 percent of direct industry output)

Editing suites at Feirstein Graduate School of Cinema.
Image courtesy of Feirstein Graduate School of Cinema.

The vast majority of jobs in this sector, about 90 percent, are in 'postproduction.' Much of the activity in this subsector is driven by demand from local productions; film and television producers, advertising agencies, and other content producers prefer to work with postproduction professionals located near their offices or production facilities, creating a steady pipeline of work for the city's post houses. Accordingly, these businesses tend to be concentrated in Manhattan and the waterfront areas of Brooklyn and Queens, reflecting the need for proximity to both soundstages and relevant corporate offices.

This reliable pipeline of work for postproduction companies is further supported by the New York State Post-Production Tax Credit, part of the New York State Film Production Tax Credit program, whereby postproduction companies can receive a tax credit of 25 percent of qualified costs incurred in New York City. This incentive further encourages New York City's studios and content producers to use local post houses for their projects' postproduction needs.

New York City's 'postproduction' subsector also enjoys other strengths, such as a robust workforce pipeline. The city is home to some of the best fine arts schools in the country, and tailored degree programs at institutions such as the Pratt Institute and Parson's School of Design provide a steady stream of highly trained professionals, particularly in visual effects and animation. Jobs in the subsector are also accessible; over 40 percent of postproduction jobs in New York City do not require a bachelor's degree, and 90 percent of jobs offer on-the-job training.[13] The City's *Made in NY Post Production Training Program* strengthens this accessibility. The five-week program, first started in 2017, provides intensive postproduction training and job placement assistance for qualified unemployed or underemployed New Yorkers.

'Postproduction' offers steady and relatively well-paid employment, furthering the importance of accessibility in this sector. In general, postproduction is a much lengthier process than filming; some postproduction projects take several years to complete, while filming usually takes a matter of weeks or months. The subsector's average annual wage per job of $92,000 is on par with the citywide average – lower than the industry average but relatively high for a subsector with many professionals

Table 5.

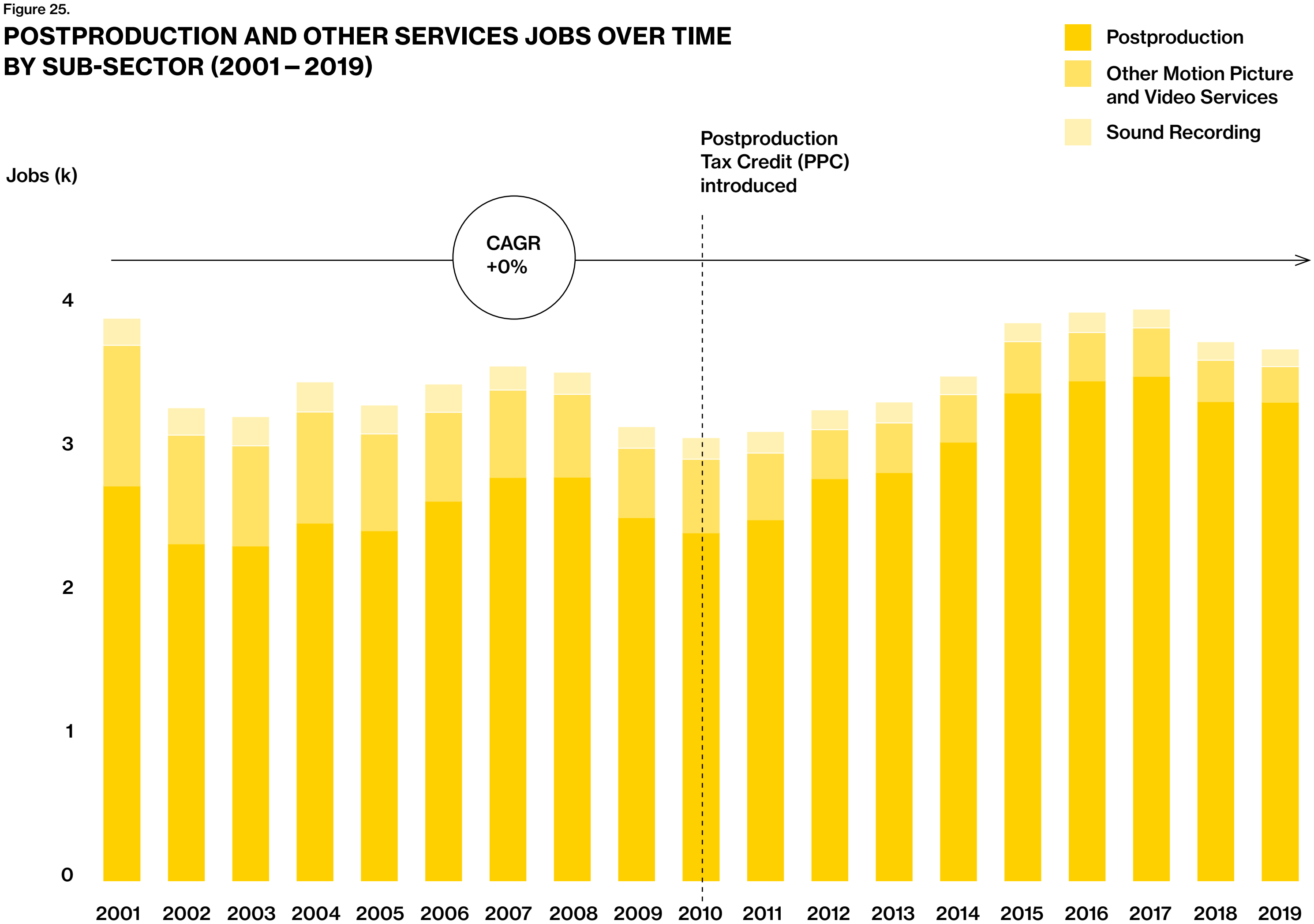
## TOP 5 OCCUPATIONS IN POST PRODUCTION

| OCCUPATION | APPROXIMATE NUMBER OF JOBS | PERCENT OF SECTOR JOBS | TYPICAL ENTRY LEVEL EDUCATION |
|---|---|---|---|
| Producers and Directors | 800 | 23% | Bachelor's degree |
| Film and Video Editors | 300 | 10% | Bachelor's degree |
| Actors | 200 | 5% | Some college, no degree |
| Camera Operators | 100 | 4% | Bachelor's degree |
| Audio and Video Equipment Technicians | 100 | 4% | Postsecondary nondegree award |

Source: Emsi 2019 QCEW and SE jobs, Buro Happold analysis

Figure 25.

## POSTPRODUCTION AND OTHER SERVICES JOBS OVER TIME BY SUB-SECTOR (2001 – 2019)




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

without bachelor's degrees. 'Sound recording', by comparison, also has a high proportion of professionals without bachelor's degrees but a much lower average annual wage per job of $62,000. Wages in the overall postproduction and other services sector have grown at an annual rate of 2 percent since 2001, on par with the citywide average.

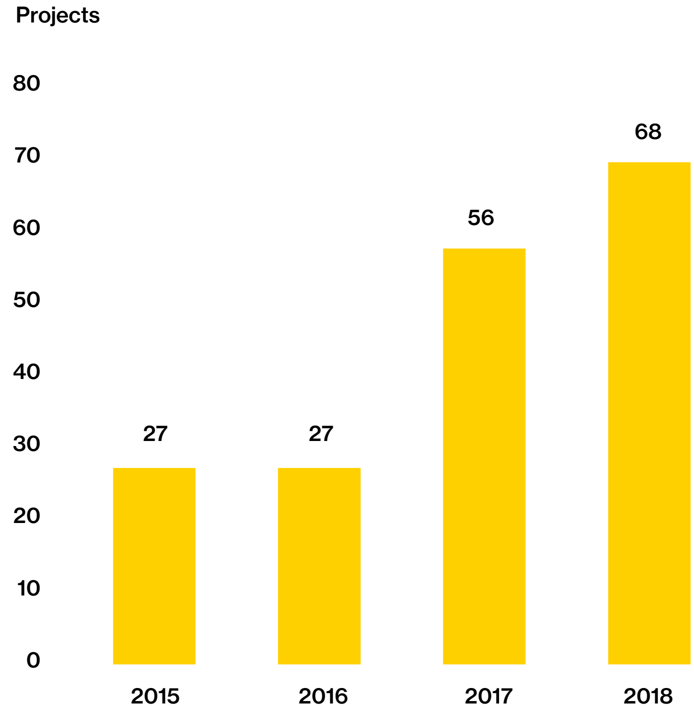
Furthermore, 'postproduction' provides job opportunities to a range of industry professionals, not just those with postproduction skills and training. Actors, for example, are the third-highest represented occupation in the subsector, reflecting the film, television, and theater actors who work in 'postproduction' as voice actors. Camera operators and audio and video equipment technicians are also highly represented in the subsector. These occupations play important roles, especially as postproduction becomes increasingly embedded in earlier stages of production. It is now common for postproduction professionals to be working on set alongside production crews during filming for, for example, projects with significant animation needs or simply to ensure that a distributor's quality and technical standards are being met.

The number of jobs in the overall postproduction and other services sector has remained relatively flat since 2001. As jobs have grown in the 'postproduction' subsector, gains have been offset by decreases in 'other motion picture and video services' and 'sound recording.' Much of the former subsector consists of businesses providing legacy services, such as film preservation and restoration, which have become less relevant since the industry's digital transformation. In the case of 'sound recording,' in-house recording has become more common among production and postproduction studios, which has driven down the number of recording studios in the city offering specialized film and television-related services.

Jobs in 'postproduction' have grown significantly over the years, particularly since 2010, when the New York State Post-Production Tax Credit was introduced; $25 million of the Film Production Tax Credit's $420 million annual budget is allocated to the Post-Production Tax Credits. Between 2010 and 2019, jobs in the 'postproduction' sub-sector grew at an annual rate of 4 percent, double the citywide growth rate of 2 percent over the same period. This growth is largely attributed to the combined impact of New York City's film and television production boom, the tax credit, and the subsector's robust workforce. The subsector's growth is further reflected in the increasing number of projects receiving postproduction tax credits in New York City, which more than doubled between 2015 and 2018.

Figure 26.

**NUMBER OF PROJECTS IN NYC RECEIVING NYS POST-PRODUCTION TAX CREDIT**




Source: New York State Empire State Development 2015–2018, Buro Happold analysis

# DISTRIBUTION & CONSUMPTION

New York City's distribution and consumption sector consists of motion picture theaters, film festivals, and distribution companies, which acquire distribution rights and distribute film and television content. Activities in this sector are a critical conduit between the industry's content producers and its exhibitors and viewers.

In 2019, the distribution and consumption sector was directly responsible for:

**3,600**
jobs
(4 percent of direct industry jobs)

**$150 MILLION**
in wages
(1 percent of direct industry wages)

**$474 MILLION**
in economic output
(1 percent of direct industry output)

'Theaters and film festivals' account for most of the jobs in this sector. Despite facing increasing pressure from competing modes of content consumption, theaters remain a key recreational venue and mode of consumption for motion picture content. Film enthusiasts, industry professionals, and New Yorkers in general appreciate the enhanced viewing experience that theaters offer. Furthermore, theatrical release is a prerequisite for awards eligibility, including for the Academy Awards, and can be a lure for filmmakers looking to maximize a film's prestige. Box office revenue also remain an important income stream for many film studios.

The 'theaters and festivals' subsector also includes New York City's thriving festival scene, including the Tribeca Film Festival, New York Film Festival, and DOCNYC, which showcase and elevate films for distributors and film enthusiasts alike, and further establish New York City as an international hub of cinema. Festivals are particularly important to New York City's film and television industry given the prevalence of independent film in the city. Festivals benefit a variety of independent film professionals and institutions: early-career filmmakers looking for funding or distribution, distributors looking for material, and independent cinemas, which often host festival screenings. The prominence of independent filmmaking in New York City also makes the city a hub for independent film distributors. The city's 'distribution' subsector includes some of the nation's top independent distributors, including Magnolia Pictures, Focus Features, and A24.

While the overall number of jobs in New York City's distribution and consumption sector decreased at an average annual rate of -1 percent since 2001, the 'theaters and festivals' and 'distribution' subsectors have different stories. Since 2001, the number of jobs in 'distribution' has contracted at an annual rate of 3 percent, largely reflecting the pressure on the subsector from the rise of internet-based streaming platforms. These vertically integrated companies engage in many of the same activities traditionally handled by distributors; they fund niche projects ("indie" films, though not independently financed), negotiate the rights and terms, and distribute the content on their own platforms. As such, there has been a trend towards fewer opportunities for distributors in New York City to orchestrate iterative distribution deals.

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**Tribeca Enterprises**

The Tribeca Film Festival began in 2001, an effort by its founders to revitalize downtown Manhattan following the September 11th attacks. When screenings began the following year, Nelson Mandela spoke at the festival's opening ceremony, where he emphasized film's unique ability to foster transcultural understanding and tolerance.[14] Twenty years later, the now-annual film festival is merely one component of Tribeca Enterprises, which also operates a production studio (Tribeca Studios), a movie theater (Tribeca Cinema), a coworking space for filmmakers, a pitch festival, and other endeavors.

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The number of jobs in 'theaters and festivals' steadily decreased throughout the 2000's, however, since 2010 jobs in the subsector have grown at annual rate of 4 percent, compared with a citywide average of 2 percent over the same period. The subsector's resurgence reflects not only the perennial joy of going to the movies, but also the rise of full-service, luxury cinemas like Nitehawk, Alamo Drafthouse, and Cinepolis, which enhance the movie-going experience with, cushioned recliners, gourmet meals, and full bars.[15]

Wages in the overall distribution and consumption sector have remained relatively flat since 2001 but it is worth noting that its component subsectors have markedly different average annual wages. Despite ongoing challenges, the 'distribution' subsector has an average annual wage of $126,000 per job, higher than both the industry and citywide averages. In contrast, jobs in 'theaters and festivals' have the lowest average annual wage in the industry, at $25,000 per job, reflecting the many minimum-wage jobs across the city's motion picture theaters.

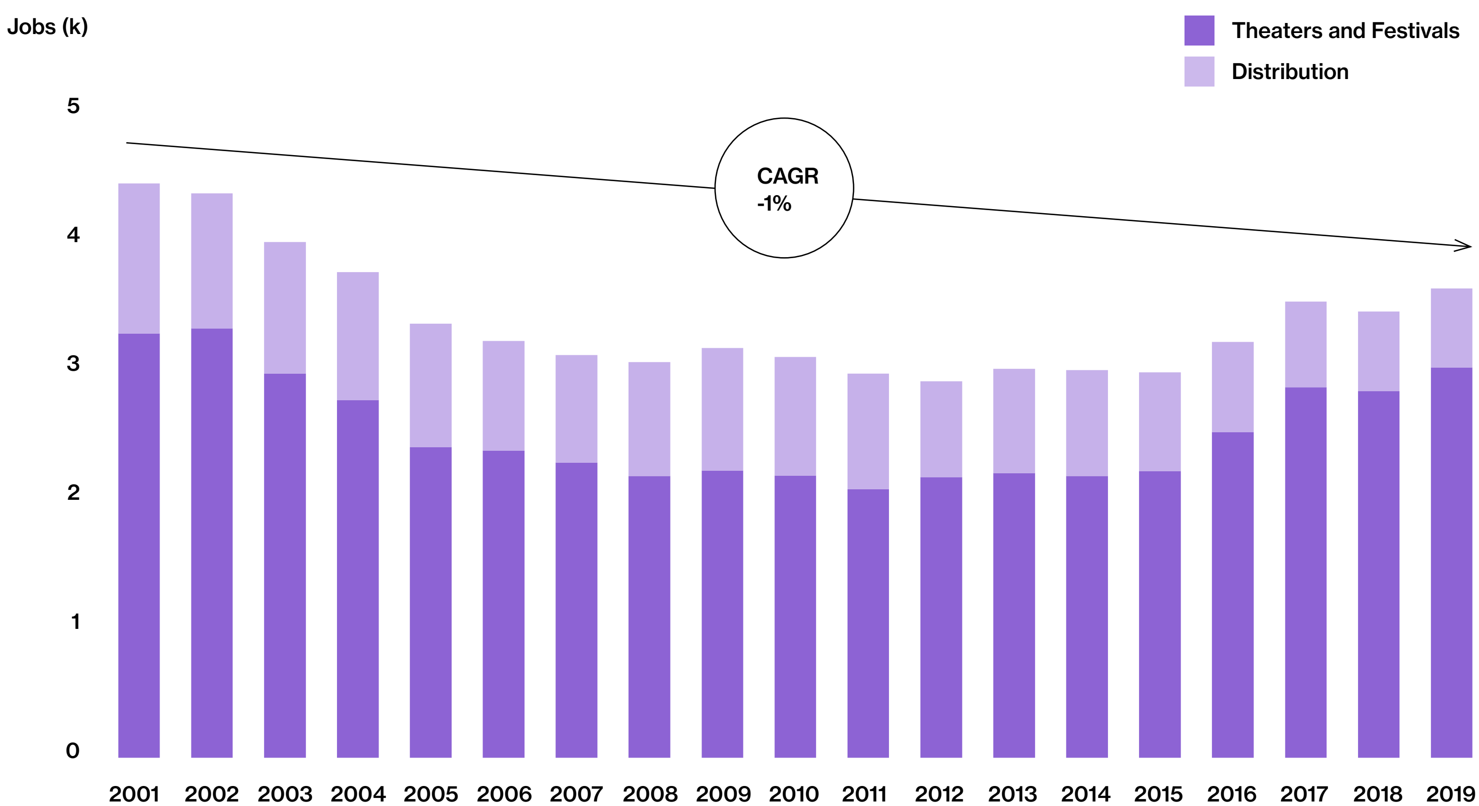
New York City is also home to a wide array of unique screening experiences beyond traditional theaters, institutions central New York City's identity as a city for arts lovers. Beloved arthouse cinemas like IFC Center, the Angelika, and Film Forum exhibit cutting-edge independent films often not screened elsewhere in the country. Popular outdoor movie series like Hudson River Flicks and the City initiative Movies Under the Stars offer free film screenings to hundreds of picnickers in the city's parks and disused piers.[16] And while film festivals do not employ New Yorkers in large numbers, they remain critical to vibrancy of the city's independent film ecosystem. The City hosts around 40 film festivals annually, giving early-career filmmakers the opportunity to share their work with the public, critics, potential backers, and future collaborators.

**Paramount Decrees**

The Paramount Consent Decrees, antitrust legislation implemented in 1948, caused the demise of the Old Hollywood studio model; their rollback in 2019 stands to have similarly major impacts on the film and television industry. The Decrees made it illegal for film studios to control the entirety of a film's lifecycle, from story development to distribution.[17] Shortly after their rollback, Netflix purchased the Paris Theater in midtown Manhattan, where it released original features. As movie theaters struggle bear the cost of a year without revenue and streaming services gain ever-growing market share, experts note that the industry trend towards vertical integration might in fact signal the return of Old-Hollywood-style monopolies.

Figure 27.

**DISTRIBUTION AND CONSUMPTION JOBS OVER TIME BY SUB-SECTOR (2001–2019)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

Screening room at Feirstein Graduate School of Cinema. Image courtesy of Feirstein Graduate School of Cinema.

# 5. BROADER ECONOMIC IMPACTS

## NEW YORK CITY'S FILM & TELEVISION INDUSTRY IS A MAJOR DRIVER OF THE LOCAL ECONOMY.

Robust local supply chains and ancillary service providers support the industry and likewise the industry's core sectors generate jobs, wages, and economic output across a broad range of sectors of the city's economy. Production studios, for instance, patronize local equipment rental businesses and food caterers and the industry's corporate players, such as subscription programming companies, engage the services of law firms and management consultants. These dynamics and inter-industry exchanges of goods and services are captured in the industry's indirect and induced impacts.

In 2019, the film and television industry in New York City supported approximately:

**85,000**
indirect and induced jobs

**$6 BILLION**
in indirect and induced wages

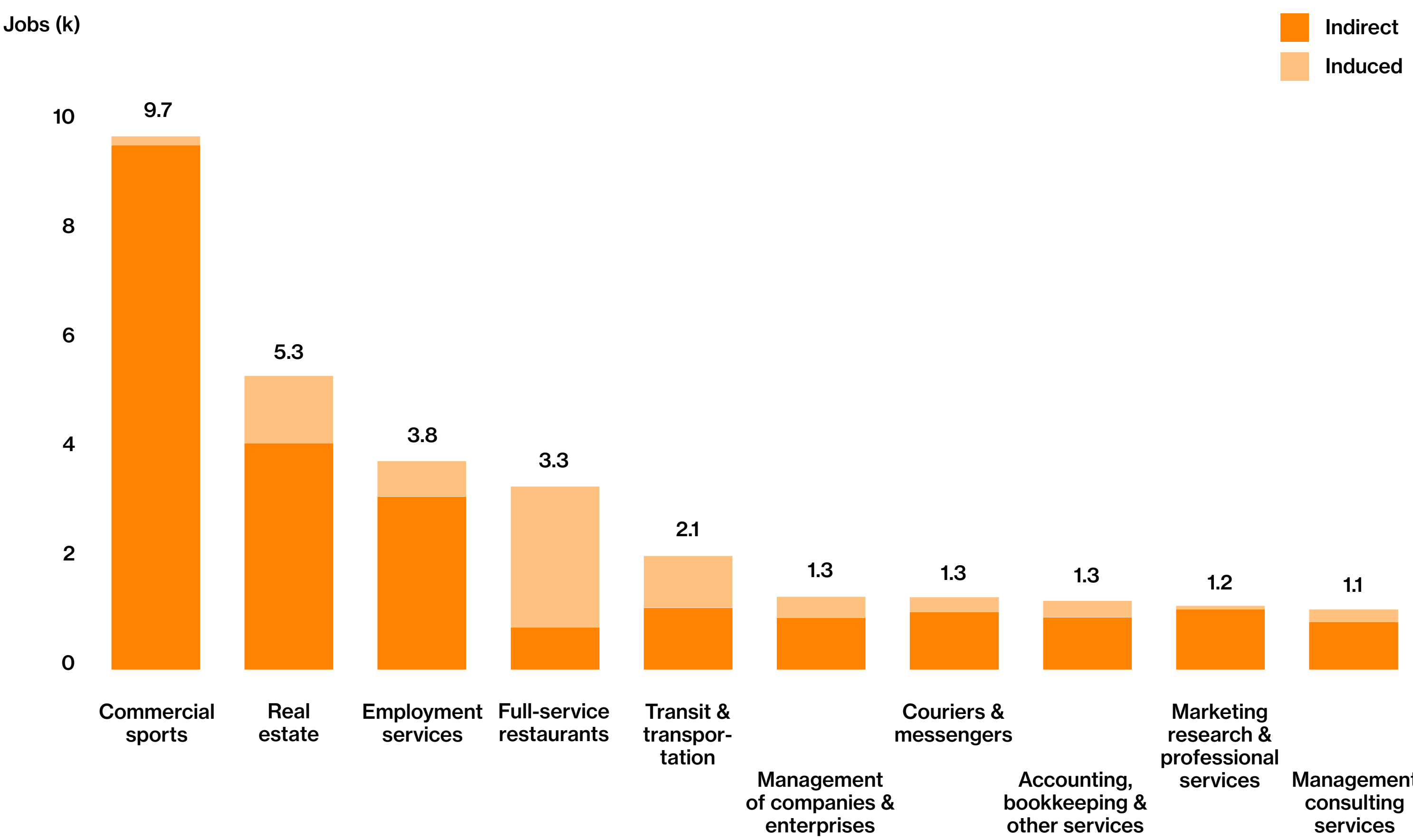
**$17.5 BILLION**
in indirect and induced economic output

Because the city's film and television industry consists of such an expansive range of activities and players both large and small – from multinational corporations and production studios to independent filmmakers and sole proprietorships – the industry not only supports some of the city's largest sectors (most notably finance, insurance, and real estate) but also smaller sectors and businesses (such as restaurants and small business accountants), which are just as crucial to sustaining the livelihoods of New Yorkers as they are to functioning of the overall city economy.

On-street production in New York City. Image courtesy of the New York City Mayor's Office of Media and Entertainment.

Figure 28.

## INDIRECT AND INDUCED JOBS BY TOP 10 INDIRECT AND INDUCED SECTORS (2019)




Source: Emsi 2019 Quarterly Census of Employment and Wages (QCEW) and Self-Employed (SE) jobs and wages, IMPLAN 2019 New York City data and economic multipliers, Buro Happold analysis

# 6. CHALLENGES

DESPITE THE FILM & TELEVISION INDUSTRY'S MANY STRENGTHS AND ASSETS THAT POSITION IT FOR FUTURE GROWTH IN NEW YORK CITY, THE INDUSTRY FACES CHALLENGES THAT MUST BE ADDRESSED IN ORDER FOR IT TO REACH ITS FULL POTENTIAL.

Some of these challenges – particularly the city's real estate constraints and the cost of living for workers – affect some sectors of the film and television industry more than others, as is described in this section. Uncertainty regarding the future of the state tax credit programs is also particularly relevant for some industry sectors, notably motion picture and video production and postproduction, but ultimately impacts the entire industry.

**Cost of real estate and production space**

The cost and availability of New York City's real estate is a limiting factor for the growth of the city's film and television industry, particularly for its most space-intensive sectors of production and postproduction.

Producers have noted that competition for booking New York City's production facilities is intense and that the city's soundstages are often fully booked. Some big-budget production companies can rent out facilities for months or years at a time and far in advance, even before production schedules are finalized. This ensures access to their preferred shooting location but constrains space availability for smaller-budget productions.[18] For soundstage and production facility owners and operators, limited opportunities for expansion and the high cost of real estate are hurdles to expanding their footprints to meet increasing demand. Nevertheless, some significant soundstage expansions are underway, and industry experts expect that these will help alleviate some of the challenges faced by productions in the short term.

Postproduction in New York City is similarly constrained by space, but these businesses typically operate in offices rather than the large industrial spaces that soundstages use. New York City's post houses are largely small businesses and many of them are sole proprietorships, as demonstrated by the fact that one-third of jobs in the 'postproduction' subsector are self-employed. As such, they share many of the same concerns as other small businesses that lease office space in New York City, including high commercial rents. This is a particular challenge for companies focused on VFX and animation, which are more space-intensive than other postproduction activities like editing due to the need to host significant computing power onsite. As such, there are relatively few VFX and animation-focused companies in New York City, and industry professionals point to the availability and cost of space as a limiting factor.

**Cost of living for industry workforce**

Despite the film and television industry's relatively high average wages, many in the industry still face challenges in terms of housing affordability and cost of living. Between 2014 and 2019, residential rents in the New York City metropolitan area have increased at an average rate of 3 percent annually, whereas citywide wages have increased at an average annual rate of 2 percent over the same period.[19] These considerations can hold sway when independent filmmakers and freelance and part-time professionals are deciding where to locate. As such, this is likewise a challenge for the city, which faces competition from film and television hubs with lower costs of living that are also vying to attract and retain the industry's talent.

A robust workforce of skilled production crews is currently one of New York City's core strengths. However, producers have noted that the city's living costs stand to impact the desirability of production jobs in the city. Going forward, it is crucial that this workforce continues to grow in line with the industry's needs.

**Protect public spaces for on-location filming**

The City's film permits provide access to New York City streets not only for parking production vehicles, but also for essential production activities, including staging equipment, and filming of local streetscapes. Recent initiatives have increased use of public roadways, including expanding bicycle lanes and bicycle sharing programs, and the creation and expansion of the Open Restaurants program. Continued coordination across these programs is required to protect street availability for on-location production across the five boroughs.

**Tax credits**

Industry professionals have expressed concern about the legislated sunset of the New York State Film Production, Post-Production, and Commercial tax credits in 2025. The current uncertainty as to whether the program will be renewed – and what its size and scope would be if renewed – is a factor that producers working on multi-year timelines weigh as they consider committing to future production in New York City.[20]

Production of *Force of Nature* (2020).
Image courtesy of the Cinematographers
Guild, Local 600.

# 6. COVID-19 IMPACTS

**NEW YORK CITY'S FILM AND TELEVISION INDUSTRY UNDERWENT AN UNPRECEDENTED UPHEAVAL DUE TO THE COVID-19 PANDEMIC.**

**BY Q2 2020, INDUSTRY JOBS CONTRACTED BY 25 PERCENT COMPARED TO 2019.**

Non-essential businesses statewide closed when the New York State on PAUSE executive order went into effect on March 22nd, 2020.* The industry was more heavily impacted by the pandemic than the overall New York City economy, having lost 25 percent of its jobs by Q2 2020 compared to the year prior, whereas the city economy lost 18 percent of its jobs over the same period. This is as a result of some industry sectors being disproportionately affected, as explained in this section.

**Motion picture and video production**

When the COVID-19 pandemic began and the New York State on PAUSE executive order went into effect in March 2020, productions halted across the city and employment in the motion picture and video production sector plummeted. By Q2 2020, the sector had lost 42 percent of its jobs compared to the year prior. The sector fared much worse than the rest of the film and television industry and the overall NYC economy, which lost 25 percent and 18 percent of jobs over this period, respectively. This disproportionate impact is attributable to the sector's reliance on in-person activities in congregate settings and inherent inability to transition to remote work.

* On March 20, 2020, in response to the COVID-19 pandemic, Governor Cuomo issued Executive Order 202.8 (called the "New York State on PAUSE" Executive Order), ordering all non-essential businesses statewide temporarily close in-person functions beginning on March 22, 2020 at 8:00 p.m.

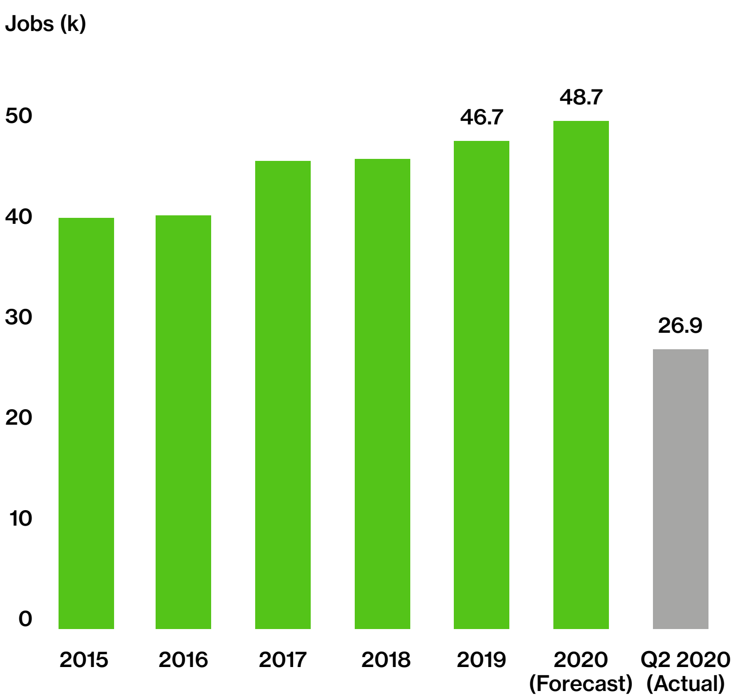
Although motion picture and video production has resumed at the time of this writing, the sector continues to face challenges in its recovery. In addition to an enormous production backlog, the cost of production has increased due to the pandemic, as frequent COVID-19 testing of casts and crews has become a standard precaution, COVID-19 compliance officers are hired to monitor health protocols, and vendors are requiring productions to have greater insurance coverage.

**Talent**

Overall, the talent sector lost 13 percent of its jobs between 2019 and Q2 2020 as a result of the COVID-19 pandemic and lockdown. However, its individual subsectors fared very differently. 'Independent talent' and 'management' lost 15 and 17 percent of their jobs, respectively, as they felt the impacts of the city's halted productions and job opportunities dried up, whereas jobs in 'education' increased by 16 percent over the same period. By and large, the city's educational institutions adapted quickly to the public health restrictions and proceeded with remote instruction for most students.

Figure 29.

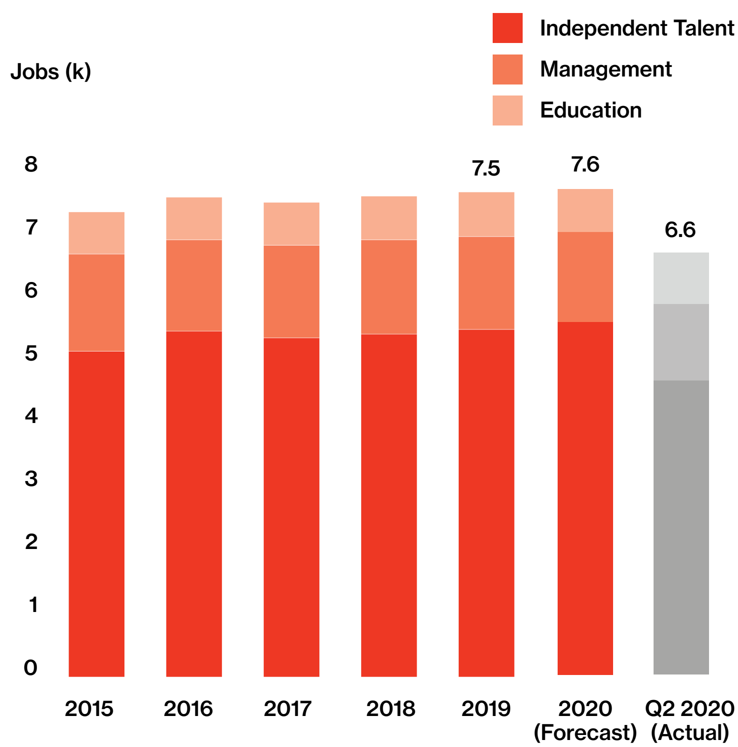
**MOTION PICTURE & VIDEO PRODUCTION JOBS OVER TIME (2015–Q2 2020)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

Figure 30.

**TALENT JOBS OVER TIME BY SUB-SECTOR (2015–Q2 2020)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

### Subscription programming

The subscription programming sector lost 7 percent of its jobs between 2019 and Q2 2020, faring much better than the overall industry and city at large, likely owing to the relative ease with which many companies were able to transition their corporate offices to remote work.

### Television broadcasting

The television broadcasting sector proved remarkably resilient in the wake of the COVID-19 pandemic and lockdown. The number of jobs in the sector contracted by only 3 percent between 2019 and Q2 2020. This speaks to the adaptability of the sector's white-collar workforce and of television broadcasting itself to a remote working environment. Broadcast studios largely remained operational during the lockdown, as studios adopted strict public health measures and many news anchors and analysts began broadcasting directly from their homes. The loss of studio tourism, however, was a blow both to the sector, as studios were unable to host their usual jubilant audiences, and to the city, which lost their tourism spending.

#### Late Night Remote Production

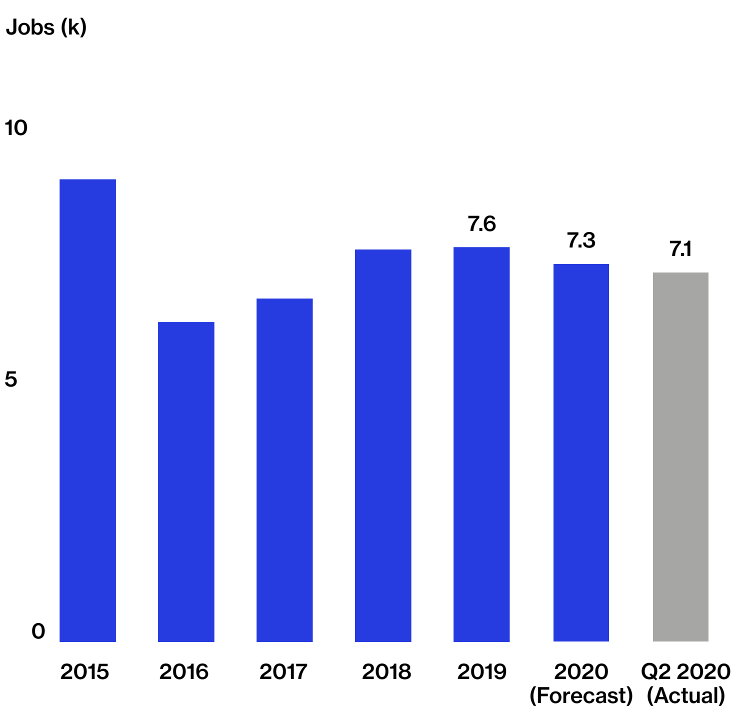
When the COVID-19 pandemic forced a production shutdown in the spring of 2020, New York City television producers got to work. Showrunners from late-night programs such as *Late Night with Stephen Colbert* and *Patriot Act with Hasan Minaj* strategized together on how to continue production while following public health guidelines. Samantha Bee, the host of *Full Frontal*, noted that she bought a new iPhone to film segments at home. Trevor Noah, host of *The Daily Show*, conducted a video interview with National Institutes of Health director Anthony Fauci, and Brad Pitt played Fauci in a remotely produced cold open on *Saturday Night Live*. (Two weeks prior, the doctor had been asked who should portray him on screen.) Late night shows returned to their studios in late summer with extensive on-set COVID-related protocols; their creative production methods amidst a public health crisis reveal the resilience and ingenuity of New York City's creative professionals.[21]

### Advertising and media buying

Advertising and media buying was the least affected sector in the film and television industry as a result of the COVID-19 pandemic, losing only 2 percent of its jobs between 2019 and Q2 2020. In fact, the number of jobs in 'media buying' grew slightly over this period, but this was offset by job losses in advertising. The sector's resilience compared to other film and television sectors is attributable to its predominantly office-based workforce that quickly adapted to remote work.

Figure 31.

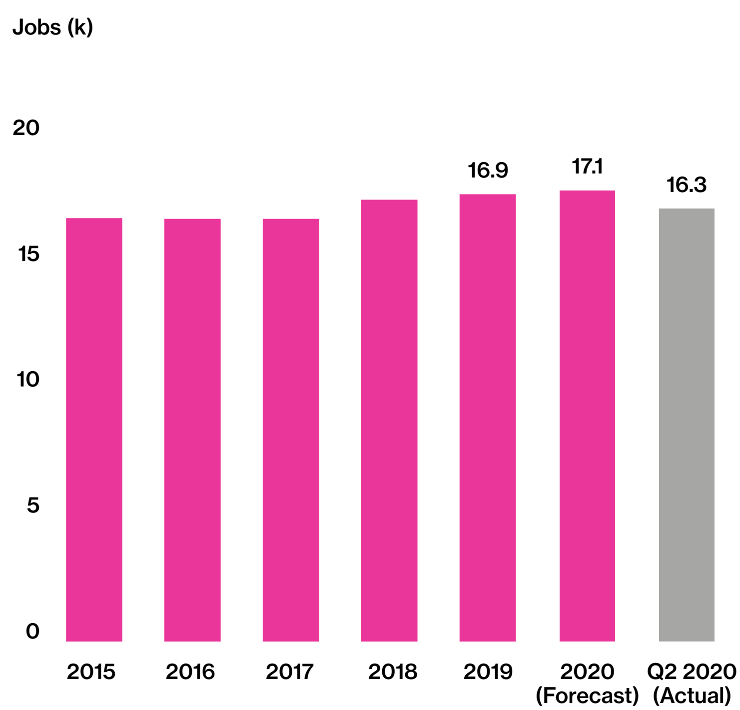
**SUBSCRIPTION PROGRAMMING JOBS OVER TIME (2015–Q2 2020)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

Figure 32.

**TELEVISION BROADCASTING JOBS OVER TIME (2015–Q2 2020)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

## Postproduction and other services

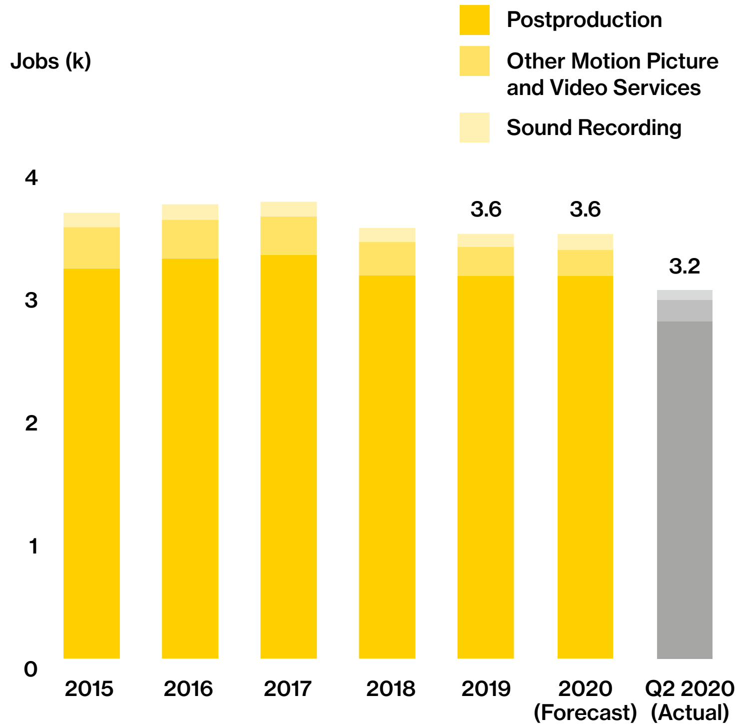
The COVID-19 pandemic impacted the three postproduction subsectors differently. By Q2 2020, jobs in 'other motion picture and video services' and 'sound recording' were almost 30 percent lower than in 2019, whereas in 'postproduction' they were 12 percent lower. Within 'postproduction', many companies adapted quickly to remote work and continued working on projects for which filming had concluded prior to the pandemic. Some even saw upticks in their businesses as lockdowns and public health protocols created unique opportunities for VFX innovations.[22] However, given the nature of the film and television production workflow, it is possible that postproduction companies will feel the impact of stalled productions during the lockdown later in 2021.

## Distribution and consumption

The distribution and consumption subsectors also differ in terms of the impact of COVID-19. Whereas jobs in 'distribution' were slightly higher in Q2 2020 than in 2019, jobs in 'theaters and festivals' were decimated by the pandemic; by Q2 2020 the number of jobs in the subsector was over 75 percent lower than in 2019. Following the NYS on PAUSE executive order, theaters

Figure 34.

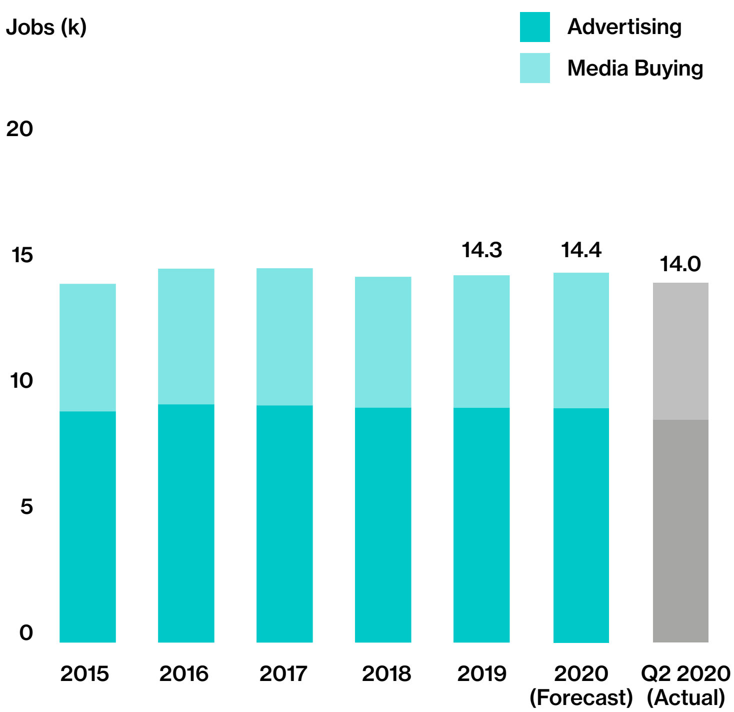
**POSTPRODUCTION & OTHER SERVICES JOBS OVER TIME BY SUB-SECTOR (2015–Q2 2020)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

Figure 33.

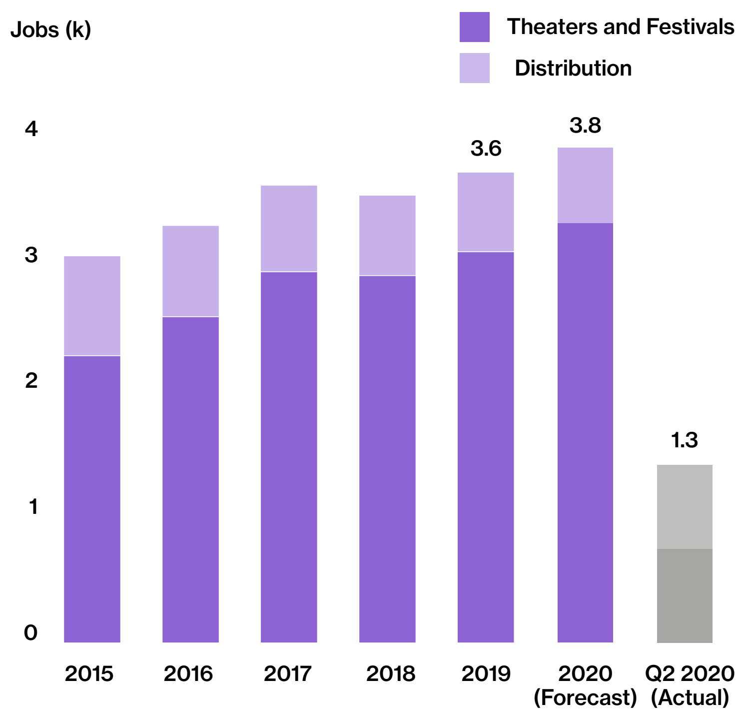
**ADVERTISING & MEDIA BUYING JOBS OVER TIME BY SUB-SECTOR (2015–Q2 2020)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

Figure 35.

**DISTRIBUTION & CONSUMPTION JOBS OVER TIME BY SUB-SECTOR (2015–Q2 2020)**




Source: Emsi 2001–2019 QCEW and SE Jobs, Buro Happold analysis

Drive-in theater screening of *The 40-Year Old Version* (2020) at Flushing Meadows Corona Park, Queens NY. Image courtesy of the Queens Drive-in.

across the city closed and did not reopen for months, interrupting the comeback that the subsector had been experiencing up until that point.

Reopening in March 2021, a year after the initial lockdown, was a welcome development for theaters owners who were able to weather the pandemic. (That same month, the popular luxury chain Alamo Drafthouse filed for bankruptcy.[23]) As of the time of this writing, theaters are not able to resume operations at full capacity, as audiences must maintain social distance. It is worth noting, however, that during the period when movie theaters were unable to operate, creative solutions emerged for screening motion picture content in a manner consistent with public health guidelines, such as outdoor cinemas and online screenings.

Although the full extent of the pandemic's impact on the 'theater and festivals' subsector is yet unclear, industry professionals are confident that movie theaters will survive the blows dealt by COVID-19. Not only was the subsector experiencing growth prior to the pandemic, but the popularity of creative distribution outlets during the pandemic speaks to the universal appeal of going to the movies. Moreover, New Yorkers might be seeking to make up for lost time once the pandemic is in the past. After all, some industry experts have noted, the 1918 influenza pandemic was followed by the roaring 20's.[24]

**Pandemic Drive-ins**

Drive-in movies made a comeback in the summer of 2020, with new drive-ins opening in all five boroughs. The retro distribution venue enabled viewers to maintain social distancing measures while enjoying the feel of an outdoor screening. The Bel Aire Diner in Queens leaned into its retro vibe with screenings of *Grease* and *Beetlejuice* – the diner itself has been operating since 1964. Other drive-in venues offered New Yorkers the chance to visit iconic New York locations like Yankee Stadium – films were screened in its parking lot – and Flushing Meadows Corona Park, home to the 1964 Worlds Fair. Film festivals also got in on the trend, with drive-in screenings at the Tribeca Film Festival and New York Film Festival. The New York Film Festival saw a 9 percent rise in viewership between 2019 and 2020; 8,300 New Yorkers attended the festival's drive-ins, and a further 40,000 viewers across the country bought tickets for online screenings. With some drive-in schedules already released for the summer of 2021 – and a steep increase in car ownership among City residents – drive-ins might outlast the pandemic.[25]

# 8. RECOMMENDATIONS

**NEW YORK CITY'S FILM & TELEVISION INDUSTRY IS INTEGRAL TO THE CITY'S CULTURE AND ECONOMY AND CAN BE FURTHER SUPPORTED BY TARGETED INITIATIVES IN SIX KEY AREAS.**


Rendering of the Made in New York Campus at Bush Terminal. Image courtesy of New York City Economic Development Corporation.

Below are six areas of opportunity for New York City government initiatives that would further support the industry and help it reach its full potential. The areas of opportunity and recommendations herein are based on the analysis and findings presented in this study.

**Infrastructure and sustainability**

- Soundstage space is a scarce resource in densely populated urban production hubs. The City has therefore invested in expanding soundstage access in New York City through the Made in NY Campus, a multi-purpose facility with 500,000 square feet of soundstage space set to open in 2022. As this project moves forward, the City should **continue to evaluate the city's soundstage capacity and demand** and explore future expansions as needed.

- The City should **continue to support and publicize the NYC Film Green initiative**, which certifies environmentally responsible production and offers resources for industry professionals to learn about sustainable practices.

- Soundstages often dispose of large amounts of costumes and furniture made for use on set. The City should **explore ways to promote the reuse of these materials**, by for example facilitating collaborations with existing City initiatives, such as NYC WasteMatch, donateNYC, and Materials for the Arts.

**Workforce development**

- The City should **continue to support its Made in NY workforce development programs**, which have successfully fostered access to training for both above-the-line and below-the-line careers. These programs include the Made in NY Production Assistant training program (a partnership with Brooklyn Workforce Innovations), the Made in NY Post Production Training Program, the Made in NY Career Panels, and the Made in NY Writers Room (a partnership with the New York City Department of Small Business Services and the Writers Guild of America East).

- The City should also **explore options to support targeted workforce development** in key need areas such as production management and accounting.

### Community relations

- The City should **continue to promote the benefits of film and television production** for New York City and its residents, from job creation and increased business activity to publicity and tourism.

- To facilitate better relationships between productions and communities, the City could **provide additional resources to their community affairs unit** to better prepare communities about productions and help productions better coordinate within diverse communities in New York City.

- Among the brightest stars in New York City's film and television industry is the city's landscape. The city's iconic landmarks and neighborhood enclaves draw motion picture and video production from all over the world, and MOME's Film Office facilitates access to New York City streets for essential production activities, including staging equipment, tying into power sources, and most importantly, filming New York City streetscapes. To preserve and grow motion picture and video production, the largest employer of all industry sectors, the City must continue to **ensure access to street locations** for filming and foster close coordination among government agencies that make decisions about allocation of streets, sidewalks and public space.

### COVID-19 recovery

- The film and television industry collaborated to develop protocols that prioritized the health and safety of its workforce and allowed it to resume operations paused by the pandemic. The City should **convene a working group of industry representatives and relevant City agencies** to distill the lessons learned from this experience and discuss best practices for public space allocation to ensure film and television is taken into consideration.

- New York City's independent movie theaters are core to the city's artistic community; they are important distribution venues for early-career artists and help attract talent to the city. However, the pandemic has put these theaters in a financially precarious position. The City could **explore opportunities for promotional and awareness campaigns** to help these theaters regain their audiences.

### Tax credit advocacy

- The New York State Film Production Tax Credit, Post-Production Tax Credit, and Commercial Tax Credit are key drivers of film and television production in New York City. As such, the City should **advocate for the continuation of the New York State tax credits** beyond their current sunset at the end of 2025 in order to keep New York City and New York State competitive with other production hubs.

- New York City should **consider advocating for an additional diversity incentive** as a potential add-on to the State tax credit program. Such an incentive would bolster employment opportunities for groups that are underrepresented in the film and television workforce while also increasing the city's competitiveness.

# 9. CONCLUSION

New York City has long been a focal point of American film and television, from the brownstones on *Sesame Street* to the shop windows in *Breakfast at Tiffany's* and the fire escapes in *West Side Story*. The film and television industry is the cornerstone of New York City's vast arts, media, and entertainment ecosystem and is a key job creation and financial engine of the city's economy. It has experienced enormous growth over the last two decades, driven by the combined effects of New York State tax credits, city-specific strengths, assets, and enabling infrastructure, as well as nationwide tailwinds such as the growing demand for content.

As of the time of this writing, the industry has begun to recover from the COVID-19 pandemic's devastating impacts. Film and television production resumed in the summer of 2020, movie theaters reopened in March 2021, and many industry professionals are optimistic about the industry and city's ability to recover. Now more than ever, it is crucial that all industry stakeholders, both in the private sector and local government, support this recovery and ensure that York City's film and television industry returns to a trajectory of growth, opportunity, and sustainability.


Recording studio at Feirstein Graduate School of Cinema. Image courtesy of Feirstein Graduate School of Cinema.


01:00:25:21

# APPENDIX

# TAX CREDITS

Table 6.

## PRODUCTION TAX CREDIT COMPARISON[26]

Over 30 states offer tax incentives to film and television productions. This table compare's New York State's credits with those in other major production hubs.

| STATE OR PROVINCE | TAX CREDIT REIMBURSEMENTS | TAX CREDIT PROGRAM BUDGET | ADDITIONAL INCENTIVES |
|---|---|---|---|
| New York State<br>N.Y. Tax Law § 24 | • Refundable tax credit<br>• 25% of BTL expenses for film and television production (30% prior to 2020)<br>• 25% of television writers' and directors' salaries, capped at $50,000 per individual and $150,000 per season<br>• No minimum production budget needed to apply | • $420 million annual budget<br>• $7 million earmarked for the production of commercials<br>• Uncapped, except for reimbursements for television writers and directors.<br>• Costs in excess of the annual budget roll over into the following fiscal year<br>• Funded through 2025 | An additional 10% reimbursement is available for productions with budgets over $500,000 that film in designated upstate counties |
| California<br>CA R&TC Chap. 3.5 | • Non-transferable, non-refundable<br>• BTL expenses and select ATL expenses exclusive of wages for writers, directors, composers, producers, and actors. Eligible ATL expenses include script research, stunt coordination, choreography, casting direction, and meals and other amenities provided on set.<br>• Reimbursement rates are as follows:<br>  • 25% for relocating tv series (20% for subsequent seasons filmed in California)<br>  • 25% for independent films<br>  • 20% for feature (studio) films, new tv series, mini-series, and pilots<br>  • Minimum budget of $1 million for films and $1 million per episode for television shows | • $330 million annual budget<br>• Funded through 2025<br>• Capped; priority corresponds to a production's job creation<br>• Planned budget allocation:<br>• 40%: new tv shows, recurring tv shows, mini-series, pilots<br>• 35%: feature films<br>• 17%: relocating tv shows<br>• 4.8%: independent films with budgets less than $10 million<br>• $3.2% independent films with budgets more than $10 million | Additional incentives of 5-10% for work conducted outside of the Los Angeles Area, for visual effects expenses, and for local hires |
| Georgia<br>O.C.G.A. § 48-7-40.26 | • Transferable tax credit<br>• 20% of ATL and BTL wage expenses<br>• For productions with a budget of at least $500,000, an additional 20% credit for non-wage BTL expenses<br>• Credits are capped at the first $500,000 of each salary. | • The program is uncapped and has no sunset date.<br>• In 2019, the Georgia Department of Revenue approved $860 million in film and television tax credits.<br>• Eligible productions include films, television shows, and video games. | Additional 10% incentives for productions that include a Georgia logo or other state promotion materials |
| British Columbia<br>B.C. Income Tax Act Part 5 | For international productions:<br>• 28% for ATL and BTL wage expenses incurred after a script is finalized; only wages for Canadian employees are eligible<br>• Stackable with a Canadian federal tax credit of 25% of wage expenses for Canadian employees<br><br>For Canadian productions:<br>• 35% of ATL and BTL wage expenses, including expenses for scriptwriting; only wages for Canadian employees are eligible<br><br>Minimum spend is 1 million CAD per film or 100-200,000 CAD per hour of television. | • The program is uncapped and has no sunset date.<br>• Between March 2018 and March 2018 British Columbia spent over 3 billion CAD on film and television tax credits, supporting 384 productions. | An additional 12.5% of eligible wage expenses is available for production in BC outside the Vancouver area |

Table 7.

## POST-PRODUCTION TAX CREDIT COMPARISON[27]

| STATE OR PROVINCE | TAX CREDIT REIMBURSEMENTS | TAX CREDIT PROGRAM BUDGET | ADDITIONAL INCENTIVES |
|---|---|---|---|
| New York State<br>N.Y. Tax Law § 31 | 25% reimbursement of postproduction expenses, including spending on VFX and animation<br><br>An additional 5% reimbursement is available for postproduction costs incurred outside the New York City metro area<br><br>An additional 10% reimbursement is available to productions with budgets over $500,000 that conduct postproduction in designated upstate counties. | • Both production and postproduction companies may apply if they meet one of the following eligibility requirements:<br>• At least 75% of a production's postproduction expenses, exclusive of VFX and animation, are spent on services performed in New York State.<br>• Either 20% of a production's VFX and animation expenses or $3 million is spent on services performed in New York State | $25 million from the Film Production Tax Credit's $420 million annual budget is allocated for the Postproduction Tax Credit. Expenses exceeding $25 million roll over into the following year's budget as part of the Film Production Tax Credit budget rollover. |
| California<br>CA R&TC Chap. 3.5 | The percentage of reimbursement is determined by the film production tax credit.<br>• 25% for relocating tv series (20% for subsequent seasons filmed in California)<br>• 25% for independent films<br>• 20% for feature (studio) films, new tv series, mini-series, and pilots<br><br>Reimbursement is capped at qualified expenditures up to:<br>• $100 million for feature films, miniseries, and television series<br>• $10 million for independent films | There is no freestanding postproduction tax credit. Productions can apply for a 5% uplift for VFX expenses if either 75% of total VFX expenditure or $10 million is spent on VFX services performed in California. | The postproduction tax credit is a component of the Film and Television Tax Credit program. The program is capped annually at $330 million and funded through 2025. |
| Georgia<br>O.C.G.A. §<br>48-7-40.26A | • 20% reimbursement of postproduction expenses<br>• An additional 10% reimbursement for postproduction of footage produced in Georgia<br>• An additional 5% reimbursement for postproduction expenses incurred in rural counties | • Postproduction companies may apply if they have more than $250,000 in annual payroll expenses and if the project's postproduction spend exceeds $500,000.<br>• Tax credits are capped at $10 million annually.<br>• Production companies may apply under the film production tax credit for a 30% reimbursement of postproduction expenses provided the footage was shot in Georgia. | The program is uncapped and has no legislated sunset. |
| British Columbia<br>B.C. Income Tax Act<br>§ 81.2 | 16% of wage and other labor costs related to digital animation, visual effects, and postproduction expenses (DAVE credit) | DAVE credits must be claimed in conjunction with a film production tax credit. There is no freestanding postproduction or VFX tax credit. | The program is uncapped and has no legislated sunset. |

# ECONOMIC ANALYSIS METHODOLOGY

This study utilizes a two-pronged approach to quantify the local economic impact of New York City's film and television industry. First, it quantifies the industry's impact according to three key economic indicators: jobs, wages, and economic output (the value of business and self-employment revenues). While this sheds light on important industry characteristics, equally as important to understanding the industry is the evaluation of film and television production trends. As such, this study also explores data for productions that have occurred in the city in recent years and evaluates their characteristics and trends.

Previous studies of film and television industries from other cities have typically defined the industry one of two ways: either as consisting of only the 'core' sectors that are fully attributable to the industry (such as motion picture and video production) or both the 'core' and 'ancillary' sectors (those that are partially attributable to the industry, such as advertising). Both approaches have their limitations. The first approach potentially underestimates the size and extent of the industry because it does not capture many of the direct film and television-related activities that occur in 'ancillary' sectors (such as the creation of film and television-related advertising content). The second approach potentially overestimates the size and extent of the industry because, insofar as studies account for 100 percent of the 'ancillary' sectors, it captures many activities that are not directly related to the film and television industry (such as digital and print advertising). This study aims to provide as complete and accurate a picture of the industry as possible and, in doing so, combines the two approaches previously mentioned. By accounting for the entirety of all 'core' sectors and only the directly relevant parts of 'ancillary' sectors (using a method described in detail below), this study balances simplicity with the need for a nuanced and comprehensive understanding of New York City's film and television ecosystem.

For data on jobs, wages, and economic output, this study relies on Emsi (a commercial provider of economic, labor market, demographic, and education data). Emsi retrieves this data from public sources, such as the United States Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) and the United States Bureau of the Census' Nonemployer Statistics (NES), as well as private sources, such as job search platforms. Whereas data from public sources is sometimes suppressed for confidentiality reasons, Emsi data removes suppressions and is available for all counties and ZIP codes, creating a more complete picture of a given industry within a regional economy. Because Emsi reports employment as annual averages, employment figures in this study represent the total number of jobs in the industry, whether the positions are full-time, part-time, or temporary. For this reason, and because a single individual can hold multiple jobs, these values are not equivalent to the number of individuals employed in the industry or full-time equivalents (FTEs). For data on full-time and part-time employment, this study relies on the American Community Survey (ACS) Public Use Microdata Sample (PUMS) published by the Census Bureau.

This study sources data on film and television productions from New York State Empire State Development (ESD). ESD publishes quarterly reports on the Film Production Tax Credit program. The reports include projected spending, hires and estimated credits for film and television projects deemed eligible to participate in the program, as well as actual spending, hires, and credits issued to projects that have been completed and audited. Because the reports only provide state-level data, it was assumed that 90 percent of the productions receiving the tax credit (and the associated spending, hires, and credits issued) took place in NYC. This assumption is based on ESD's finding that about 90 percent of in-state spending by credit-eligible projects occurs in NYC.[28] Similarly, it was assumed that 78 percent of the productions receiving the Film Post-Production Tax Credit took place in NYC. This assumption is based on Post New York Alliance's finding that 78 percent of post-production firms in the state are located in NYC.[29] For data on location shoots and permitting, this study relies on permitting data made available by MOME.

**Types of economic impact**

New York City's film and television industry consists of seven sectors: motion picture and video production, talent, subscription programming, television broadcasting, advertising and media buying, postproduction and other services, and distribution and consumption. These sectors and their component subsectors encompass the full lifecycle of industry activities and are what generate the industry's direct economic impact. The industry's direct economic output, for example, consists of the revenues attributable to the entities in these sectors, from business-to-business spending within the industry (e.g. for the rights to distribute a motion picture) to sales to consumers (e.g. cable subscriptions).

The direct economic activity of these sectors (measured in terms of jobs, wages, and economic output) indirectly creates additional jobs, wages, and output in other sectors of the New York City economy. This is called the industry's *indirect* economic impact. For example, the industry's motion picture and video production subsector creates jobs, wages, and revenues for suppliers and service providers in non-industry sectors, such as legal practices, equipment rental companies, and caterers.

Employees in direct and indirect sectors create additional economic impacts by spending their wages at New York City businesses, such as restaurants and pharmacies. This flow of money supports additional local jobs, wages, and revenues. This is called the industry's *induced* economic impact.

**Direct economic impact**

Economic data sources use the industry standard North American Industry Classification System (NAICS) to report data in order to ensure consistency and comparability across sources and uses. Each NAICS code represents a specific sector or subsector of the economy. Large industries like film and television typically consist of multiple NAICS codes, which creates some variability in the way industries are defined.

As previously noted, this study takes a nuanced approach to defining the industry in order to mitigate the over- and under-estimation problems that other studies may encounter. This requires identifying the sectors that are obviously 'core' to the industry and only the portions of 'ancillary' sectors that are attributable to the industry. Motion picture and video production (NAICS 512110), for example, is a 'core' sector because 100 percent of its activity is attributable to the industry. Advertising agencies (NAICS 541810), however, is an 'ancillary' sector because although some of its activity is central to film and television, much of its activity pertains to other industries, such as print publishing and internet media.

Accounting for the portion of the advertising sector (and the others like it) that is attributable to the film and television industry requires calibrating the sector's data to only reflect the share that is directly relevant to the industry. This calibration involves taking a 'cut' of the sector, informed by sector-specific research, occupations-level workforce analysis to identify the share of film and television-related activity within each sector, and expert insight from industry professionals. Each sector's 'cut' is applied consistently across the entire economic impact analysis to ensure consistency.

Because this study uses an industry definition that spans over a dozen sectors, the NAICS codes are mapped to a simplified industry framework that is structured around seven main sectors. Direct jobs, wages, and economic output data are evaluated and reported according to these sectors and their component subsectors. Demographics and other workforce characteristics are also reported in this way. This provides the direct economic impact of the film and television industry.

Table 8.

**FILM AND TELEVISION INDUSTRY FRAMEWORK (WITH NAICS CODES)**

| SECTOR | SUBSECTOR | NAICS CODE |
|---|---|---|
| Motion picture and video production | | 512110 – Motion picture and video production |
| Talent | Independent talent | 711510 – Independent artists, writers, and performers |
| | Management | 711410 – Agents and managers |
| | Education | 611610 – Fine arts schools<br>611310 – Colleges and universities |
| Subscription programming | | 515210 – Cable and other subscription programming |
| Television broadcasting | | 512191 – Television broadcasting |
| Advertising and media buying | Advertising | 541810 – Advertising agencies |
| | Media buying | 541830 – Media buying agencies |
| Postproduction and other services | Postproduction | 512191 – Teleproduction and other postproduction services |
| | Other motion picture and video services | 512199 – Other motion picture and video industries |
| | Sound recording | 512240 – Sound recording studios |
| Distribution and consumption | Distribution | 512120 – Motion picture and video distribution |
| | Theaters and festivals | 512131 – Motion picture theaters except drive-ins |

### Indirect and induced economic impacts

Modelling indirect economic impact involves estimating the impact of business-to-business spending between the film and television industry and non-industry entities. Modelling induced economic impact involves estimating the impact of spending by employees of direct and indirect sectors on the overall New York City economy. IMPLAN is a commercial platform and is the most commonly used tool for this type of analysis. It uses 'input-output' models to assess cross-industry effects, using historical data to predict how different sectors relate to one another, and how output from one sector serves as input to another. Once the industry's main sectors, component subsectors, and corresponding metrics (jobs, wages, and economic output) are modelled, this study uses IMPLAN to estimate the same metrics for all relevant indirect and induced sectors. This provides the indirect and induced impacts of the film and television industry.

### Limitations

This study balances simplicity and replicability with the need for a nuanced and accurate understanding of New York City's film and television ecosystem. There are several considerations that should be noted regarding the data sources used:

- ESD only publicly reports data for productions that apply and are deemed eligible to participate in the NYS Film Production Tax Credit Program or are granted the credit. This study therefore does not account for the many film and television productions that take place in New York City and did not apply or were not deemed eligible for the tax credit.

- ESD data are only available at the state level. In the absence of city-specific data, this study downsized the ESD data to the city level using a best-available estimate from existing research.

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# INTERVIEWEES

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Gina Argento – Broadway Stages
Tony Argento – Broadway Stages
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Anne Carey – Archer Gray
Winnie Chaffee – Titmouse Animation
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Alan Suna – Silvercup Studios
Mike Tollin – Producer and writer
Pete Torres – Tribeca Enterprises
Matt Tyrnauer – Director and producer
John Vanco – IFC Center
Michael Walbrecht – Warner Bros. Entertainment
Karin Watson – Creative BC
Anne Wurts – FilmLA

# CONTRIBUTORS

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**Core Team**
Shira Gans – Senior Executive Director, Policy and Programs, Mayor's Office of Media and Entertainment
David Bigio – Consultant, Buro Happold
Samantha Fox – Consultant, Buro Happold, Assistant Professor, Lehigh University
Shayan Lotfi – Associate Principal, Buro Happold
Alice Shay – Associate Principal, Buro Happold

The core team drafted this report and led the research and analysis.

**Mayor's Office of Media and Entertainment**
Anne del Castillo – Commissioner
Michaela Shapiro – Urban Fellow

**Buro Happold Cities**
Adam Friedberg
Gabe Warshaw
Rohan Rao
Sean Thompson

**Public Works Partners**
Celeste Frye
Aurelia Aceves
Favio German
Jennifer Chung
Caroline R. Bastian

**Nowhere Office**
Yeju Choi

# NEW YORK CITY FILM & TELEVISION INDUSTRY

Economic
Impact Study
2021

The Mayor's Office of Media and Entertainment (MOME) launched the NYC Film & Television Economic Impact Study to provide a detailed assessment of the size, characteristics, and trends of the New York City film and television industry.

Because the industry's significance to New York City is so wide-ranging, the study's analysis entailed a multi-layered research process and broad stakeholder conversations – and incorporates analysis of the industry after the COVID-19 pandemic for the first half of 2020.

NYC
Media &
Entertainment