BUILDING NEW YORK'S VISUAL MEDIA INDUSTRY FOR THE DIGITAL AGE

Findings and Recommendations

June 2000

Prepared by
THE BOSTON CONSULTING GROUP
at the request of the
NEW YORK CITY INVESTMENT FUND and
NEW YORK CITY COMPTROLLER'S OFFICE

with support from
MAYOR'S OFFICE OF FILM, THEATRE AND BROADCASTING

NEW YORK STATE GOVERNOR'S OFFICE FOR MOTION PICTURE
AND TELEVISION DEVELOPMENT

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by

The Boston Consulting Group, Inc.
135 East 57th Street
New York, NY 10022

June 6, 2000

AGENDA

Executive summary

Media industry baseline analysis

Situational analysis - driving to recommendations

Recommendations

Appendix

- **Baseline analysis**
- **NY Film Commission incentives**

NEW YORK MEDIA PROJECT MISSION STATEMENT

Visual media is rapidly evolving and is among the most important economic sectors for New York, in terms of job generation and contribution to the local economy

Other localities are aggressively seeking to attract production business from New York

The purpose of this study is threefold: first, to quantify the baseline; second, to assess New York's competitive position; and third, to determine what New York needs to do to support and expand its position as a center of film, television, commercial and digital media production in the digital age

PROJECT OBJECTIVES AND APPROACH

Objectives	Approach
1. Determine importance of the media industry to New York economy • **Size the baseline** **2. Define and understand the location decision making process** **3. Assess New York's competitive position compared to other localities** **4. Recommend opportunities to maximize New York's competitive position**	**Interviews** • **With key participants in the media industry subsectors** **Desk research** • **Leverage current data through SIC filings, tax records, and other internal studies** • **Launch new analysis where appropriate** **Joint teams** • **Project teams comprised of resources from BCG and public and private entities**

EXECUTIVE SUMMARY

New York's traditional media business creates substantial numbers of jobs and income

- **Our full survey of all aspects of media spending, from pre to post-production and in all types of media, shows that traditional media direct spending is about $5.0 billion per year, and total direct and indirect spending is about $10 billion(1)**
- **Traditional media accounts for over 70,000 jobs in New York City**

Recent surveys show that digital media accounts for 100,000 jobs in New York City(2)

- **Digital media also contributes about $5.0 billion to New York City**

The study shows that New York has been successful in New Media in part because of its historical strength in traditional media

- **The two types of media industries fuel each other**

The study recommends that New York should take steps to ensure the continued growth and success of these two essential industries

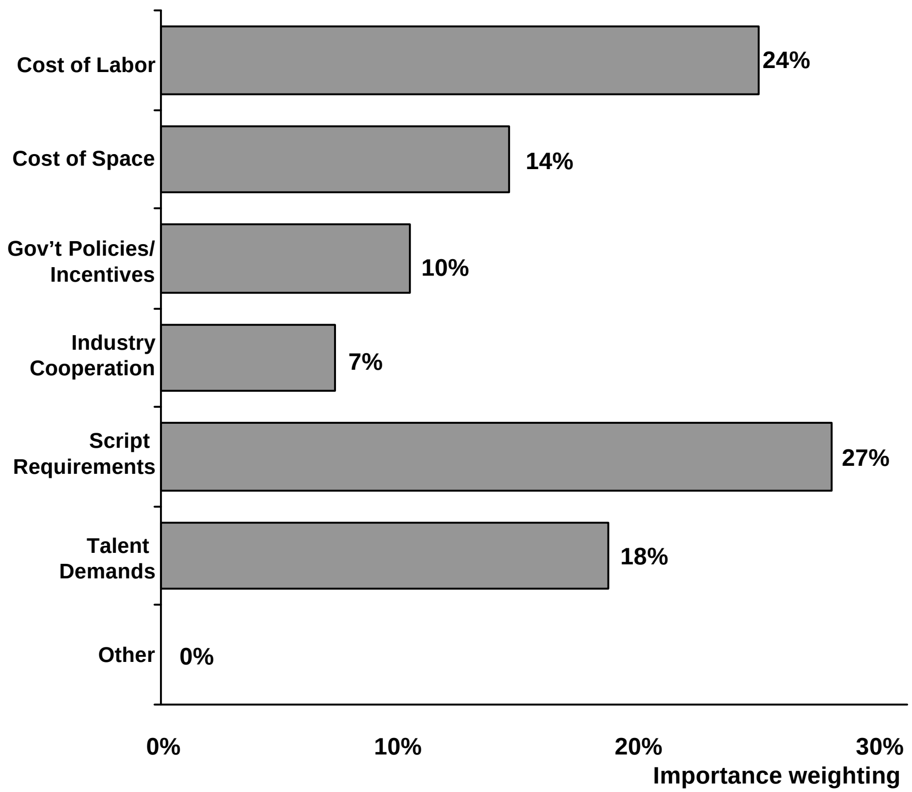
- **Attract production & develop space for traditional media and wired office space for digital media**
- **Encourage government incentives, policies and priorities that target traditional and digital media**
- **Focus on all stages of production and ensure cooperation between traditional and digital media**

Organizations supporting traditional media and digital media will join forces to work together to strengthen both media

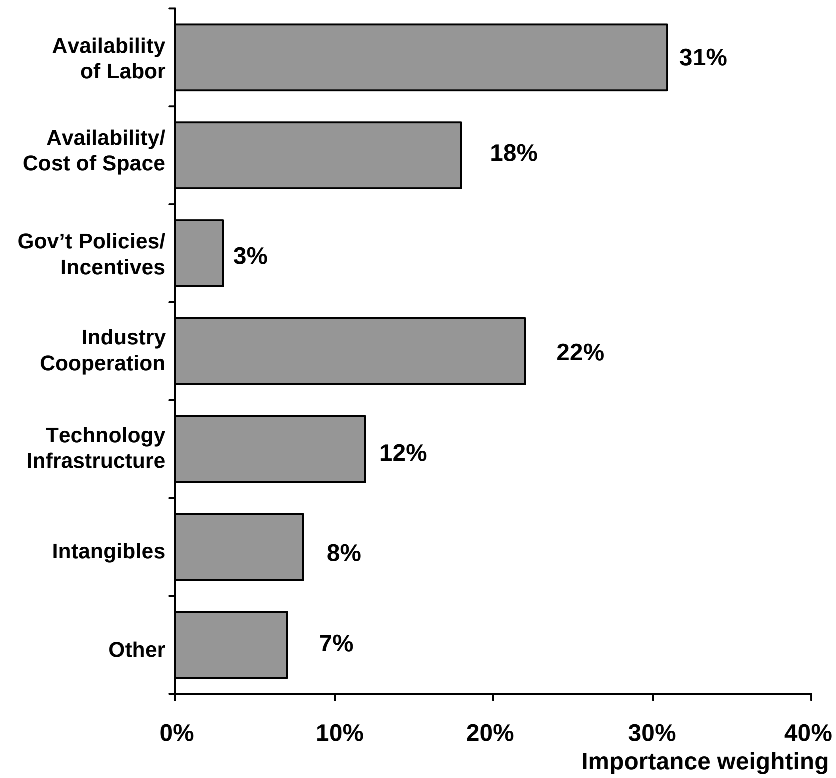
(1) Assumes multiplier of 2.0, (The previously reported figures of $2.5 billion in direct spending was based on permitted production only rather than the full media industry in New York City)
(2) NYNMA/PwC study, BCG analysis

TRADITIONAL AND DIGITAL MEDIA SECTORS CHOOSE PRODUCTION LOCATIONS BASED UPON DIFFERENT CRITERIA

Traditional Media



Digital Media



Opportunity to exploit New York strengths and craft recommendations around core needs

Source: BCG analysis and interviews
Numbers may not add up to 100 due to rounding

NEW YORK CITY WELL POSITIONED FOR TRADITIONAL AND DIGITAL MEDIA

Summary of Industry Interviews

	New York's position	
	Traditional Media	**Digital Media**
Strengths	Acting pool depth and expertise Crew depth and expertise International production center • Creative and crafts communities • Production facilities, goods and services Script requirements Talent demands	Concentrated presence of industry participants (e.g., advertising, finance, publishing, broadcast television, etc.) Technology infrastructure Intangibles (e.g., "coolness" factor, Internet industry epicenter, etc.)
Challenges	Some other localities very aggressive in providing direct subsidies Cost position • Labor and space	Availability of skilled labor Availability/cost of space Leveraging potential for industry cooperation

However, both sectors at risk without public and private support

Back-up

INTERVIEW PROGRAM INCLUDED OVER 60 KEY INDUSTRY PLAYERS

Decision Makers as Well as Labor, Vendors, Education and Government

Decision makers	Labor	Vendors	Education and Government
16 Features producers 14 Television producers 6 Commercial producers 8 Digital Media executives	4 Major Labor participants	9 Vendor participants	5 Education and Government participants

KEY ACTION: MAKE NY THE EAST COAST MEDIA ZONE

Focus on Public/Private Partnership and Convergence of Traditional and Digital Media

Create districts throughout New York City that anchor an East Coast *Media Zone,* providing a "critical mass" of facilities and talent for film, television and broadband production

- **Support development of production and space for Traditional Media and wired office space for Digital Media**
- **Encourage government incentives, policies and priorities that target Traditional and Digital Media**
- **Focus on all stages of production and ensure cooperation between Traditional and Digital Media**

Foundation #1

Encourage concentrated real estate and infrastructure development to meet industry needs
- **Create professional, affordable space for features and television**
- **Continue and expand efforts to make public property available to producers at low cost**
- **Encourage concentrated development of office space for Digital Media**
- **Ensure appropriate communication and electrical infrastructure**

Foundation #2

Promote investment in education and public/private cooperation to prepare a workforce that can meet industry needs
- **Expand the technically proficient workforce through education programs**
- **Help educational institutions benefit from (and sustain) current NY position**

Foundation #3

Convene industry groups and others in a Visual Media Consortium
- **Expand efforts of private sector organizations focused on industry needs and issues**
- **Monitor NY's competitiveness with other localities**

Foundation #4

Launch joint industry/public sector marketing campaign to promote New York's commitment to the industry and underscore efforts to link digital and traditional media

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BASELINE
Summary

New York's traditional media business creates substantial numbers of jobs and income

- **Our full survey of all aspects of media spending, from pre to post-production and in all types of media, shows that traditional media direct spending is about $5.0 billion per year, and total direct and indirect spending is about $10 billion(1)**
- **Traditional media accounts for over 70,000 jobs in New York City**

New York's overall media business contributes ~ $10 billion directly to the city economy based on the full survey and other recent studies (2)

Both types of media helped sustain substantial numbers of jobs in 1999 to New York City

- **Traditional Media production and corporate headquarters contributed 70,000 jobs**
- **Digital Media contributed approximately 100,000 jobs(2)**

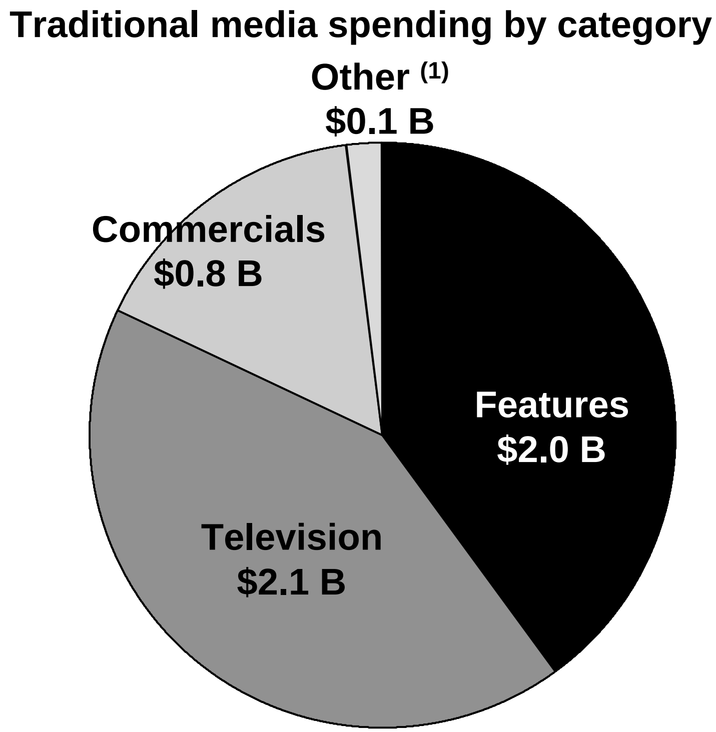
In terms of Traditional Media value chain, production (principal photography) accounts for lion's share of spending at 80%

- **Pre-production approximately 10% and post-production approximately 10%**

Among the Traditional Media sectors, features and television each represent approximately 40% of dollar spending

(1) Assumes multiplier of 2.0
(2) NYNMA/PwC study, BCG analysis

MEDIA PRODUCTION CONTRIBUTES SIGNIFICANT VALUE TO THE NEW YORK ECONOMY



Employment: 70,000

Spending: $5 Billion

Need to ensure media production remains and grows in New York

(1) Other includes student films, industrial films, music videos, documentaries
Source: BCG analysis

TRADITIONAL MEDIA METHODOLOGY LEVERAGES THREE APPROACHES TO ESTIMATE SPENDING AND EMPLOYMENT

	Dollar Spend	Employment
Method 1	**Current methodology** • Build off of existing data [(1)] to estimate full production value chain, including pre/post production, non-permitted commercial shooting	**Top down approach** • Analyze union and payroll company employment data
Method 2	**Sample Budgets** • Estimated spending through analysis of sample budgets	**Sample budgets** • Utilize average employment figures from sample budgets
Method 3	**MPAA approach** • Determine payroll spend and use to estimate total industry spend	**Standard Industrial Classification Code (SIC)** • Analyze statistical data reported by media companies

Approach broadens activity space and leverages existing data
- **Analyze entire production value chain**

(1) Annual statistics from NYC Mayor's Office of Film, Theatre and Broadcasting for principal photography location days

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SITUATIONAL ANALYSIS
Three Factors Considered in Designing Recommendations

Needs of media sectors in deciding upon a location

- **Traditional Media needs both shooting locations and production office space**
- **Digital Media values availability of labor/talent, industry cluster advantages and availability/cost of space**

New York's comparative positioning vs. other locations

- **What can be leveraged, where do we have advantage?**

Focus on enhancing NY's competitive position in light of challenges

SECTOR NEEDS DRIVE LOCATION OF PRODUCTION
Summary

Traditional Media location decisions are driven by cost, script requirements and talent preferences

- **Generally, in absence of unique script or talent situation, cost will be main driver of decision**

Within Traditional Media, features, television and commercials value the three main criteria differently

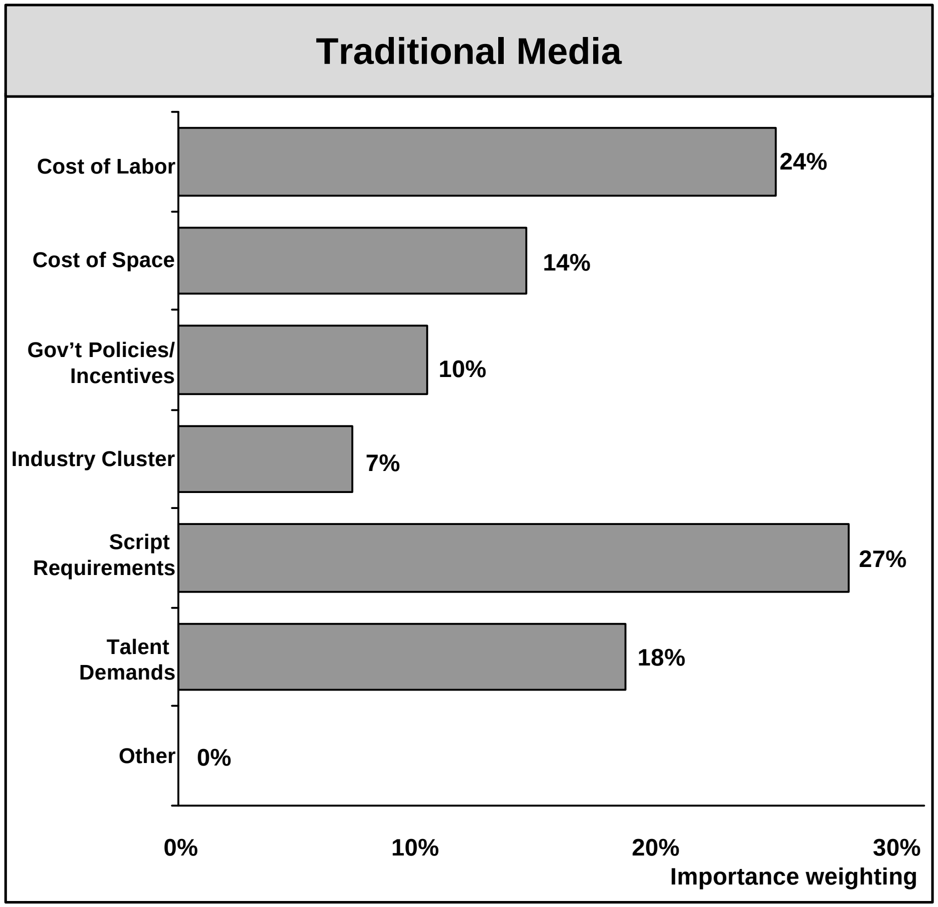
- **In general, as budgets get smaller for television movies and commercials, cost becomes more important in location decisions**

Digital Media values availability of labor, industry cluster advantages and availability/cost of space

- **Access to talent is primary concern**

COST, SCRIPT REQUIREMENTS AND TALENT DEMANDS DRIVE LOCATION

Interview Findings



Cost considerations

- **"Cost Consultants have boiled everything down to the bottom line. Budgets are set and it is up to us to meet the cost requirements."**

  - Commercial Producer

Script and talent demands

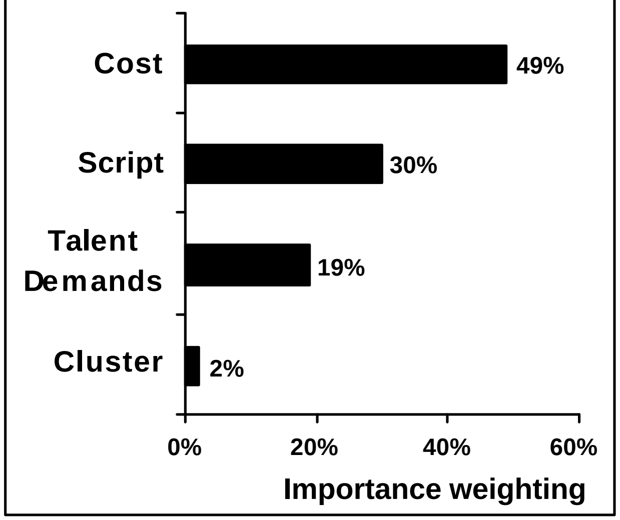
- **"50% of scripts already have a star or director attached to them, and will be driven by artistic requirements and star demands [intangibles]. The 50% of scripts without talent attached will be more cost driven."**

  - Feature Film Producer

Source: BCG analysis and interviews
Numbers may not add up to 100 due to rounding

CRITERIA WEIGHTINGS VARY BY SECTOR

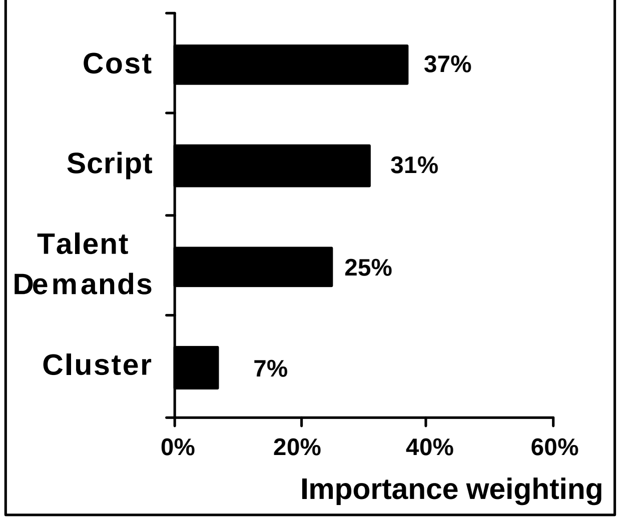
Features



“Location decisions tend to be a trade-off between costs, script and talent … a script can drive the decisions as can A-list talent, but without those factors, cost will be the primary concern.”

- Features Producer

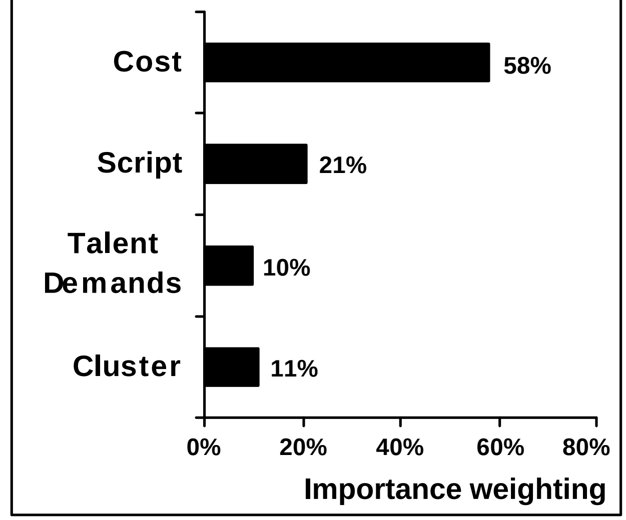
Television



“Our incentive is to make shows as cheaply as possible so the studio’s risk is minimized. However, there are certain things that I won’t compromise on, like the energy of a location which you can’t fake.”

- Television Producer

Commercials



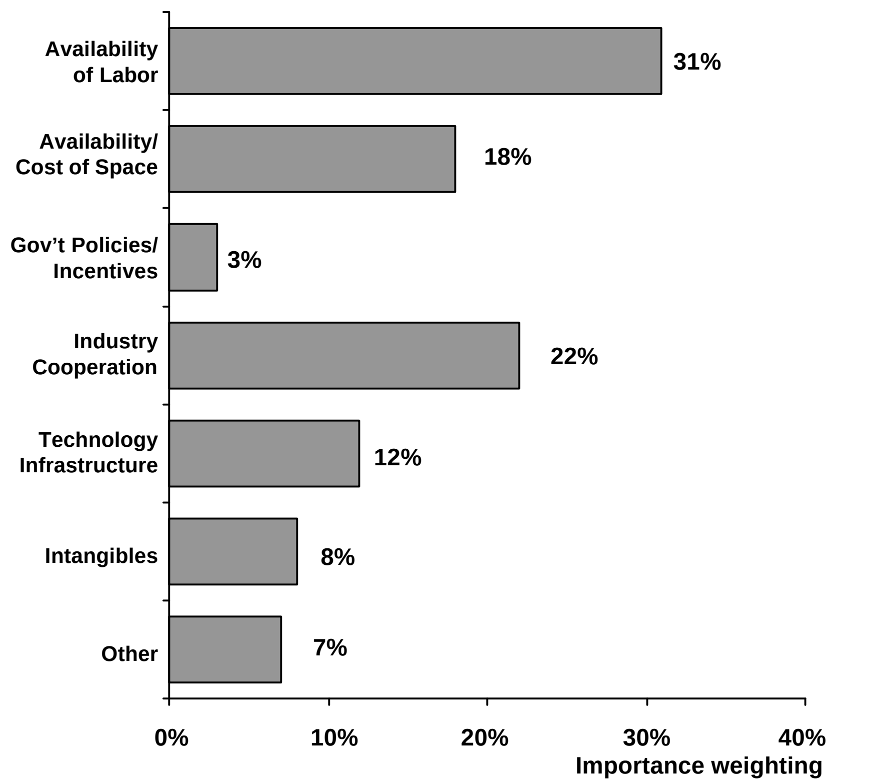
“It’s all about costs. Clients have become much more savvy regarding marketing spend, and they drive the decisions because they pay the bills.”

- Commercial Producer

Source: BCG analysis and interviews
Numbers may not add up to 100 due to rounding

DIGITAL MEDIA LOCATION DECISIONS DRIVEN LARGELY BY ACCESS TO TALENT

Digital Media decision criteria



Ability to hire talent a key concern

- **"Once you have recruited the talent, it is easier to get the rest done."**
  - Animation Producer

- **"My biggest challenge is finding enough people on a cost effective basis. Most of the schools that I hire at are outside the New York area. New York schools should be more aggressive in their contact with the business community."**
  - CGI Producer

NY lacks collaborative environment

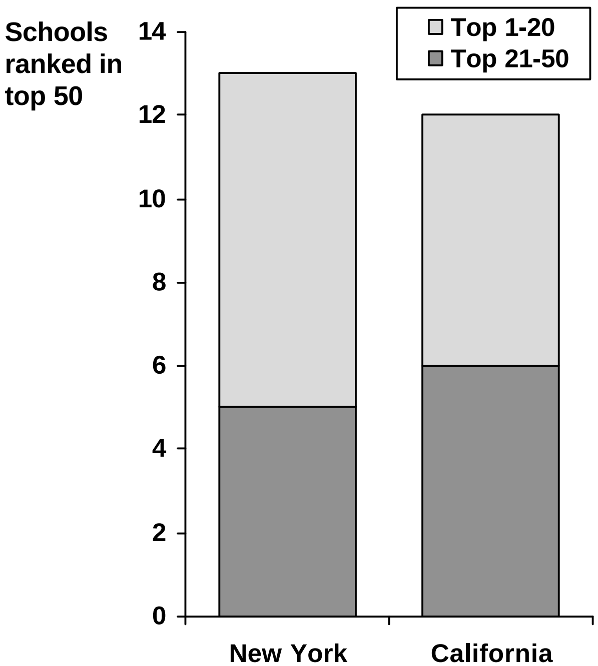
- **"The strategic advantages of the NY community are not being exploited. NY needs someone out there making deals and getting things done."**
  -Digital Media executive

Source: BCG analysis and interviews
Numbers may not add up to 100 due to rounding

NY DIGITAL MEDIA FIRMS CITE AVAILABILITY OF CREATIVE AND TECHNICAL TALENT AS PREDOMINANT CHALLENGE

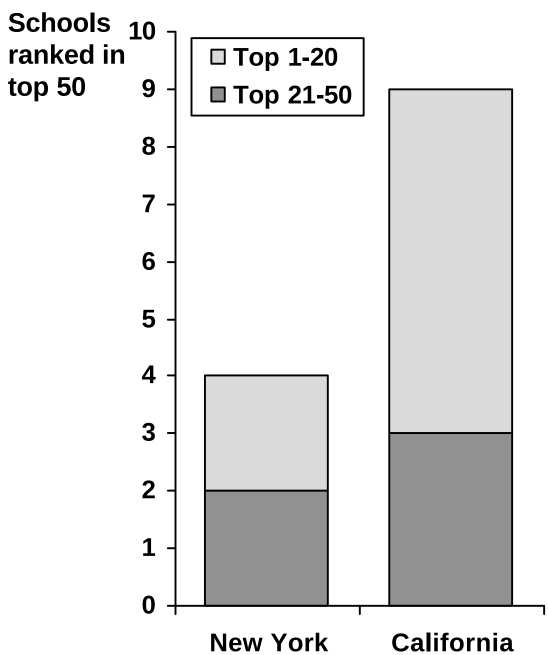
100% of Interviews Cited Availability of Talent as Concern

Although New York State has relatively equal share in top creative programs...



California schools have best reputations in computer aided graphics/digital media

…New York State is disadvantaged in top engineering programs



2 of top 3 computer engineering specialty programs in Silicon Valley

Lack of industry critical mass further hurts ability to attract talent

Critical mass needed to support freelance worker community

> **"Talent moves to CA because they need a large pool of companies who can offer a steady stream of work - NY lacks the critical mass to supply a strong job network"**
>
> **- Digital Media executive**

Talent attracts more talent

> **"I lose a lot of people to CA because they feel that they have learned all they can here in NY and need to move on to more 'cutting edge' work"**
>
> **- Digital Media executive**

Source: US News & World Report rankings, 1997 and 1999; BCG interviews; BCG analysis
Numbers may not add up to 100 due to rounding

SECTOR NEEDS DRIVE LOCATION OF PRODUCTION
Conclusion and Implications

Traditional Media

Script requirements, talent demands and the availability of professional crews sustain New York's core attractiveness to the industry. To increase demand and attractiveness for this part of the sector:

- **New York should seek to support expansion of professional and affordable facilities and production services**
- **New York should work to enhance its image as "film friendly" and market existing attributes and new initiatives**

Digital Media

Silicon Alley has created a strong digital media community. To ensure continued growth in this part of the sector:

- **New York should seek to attract and/or create technically capable workforce**
- **New York should seek to exploit the inherent industry segment advantages**
- **New York should seek to expand the development of affordable space**

NEW YORK COMPETITIVE POSITION
Summary

NY offers quality crews and top notch acting talent

- **High quality crews and unique "look and tempo" attractive for production**
- **Theatre community often cited as fueling city's top notch acting talent pool**

NY film commissions described as extremely professional, with strong customer service

Generally, NY cost position can be a challenge relative to other locales

Primary components of cost difference to other locales are wage rates, work rules, contract structure, exchange rates and government subsidies

NY value proposition compared to other locales is more competitive than cost analysis of published rates might first suggest

- **NY perceived to offer higher quality crews which can cost less in long run**
- **Ability to negotiate "one-off deals" further narrows cost gap**

Among major production centers, Canada most aggressive with direct subsidies

- **The US has not benefited from federal government subsidies**
- **Other localities seeking to develop programs to attract production**
- **Other English-speaking countries offering direct budget support**

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PROTECT AND GROW TRADITIONAL MEDIA WHILE PREPARING FOR THE DIGITAL AGE

Traditional Media contributes significant revenues and jobs to New York

- **Motion picture production and services were among the largest job growth industries in New York City from 1992-1998, more than doubling according to the City Department of Labor**
- **Growing competition from other localities requires New York to respond to ensure support and growth for NY's strong global industry position**

New York can sustain and grow market position by integrating Traditional Media with the latest developments in digital technology

- **NY should focus on ensuring a supportive environment, as opposed to placing bets on technologies or individual companies**
- **NY should continue to leverage its strengths in graphic arts, animation, video, music and digital communication technologies**

Interviews with industry leaders produced the following set of recommendations for how the public and private sectors can help meet the industry's infrastructure, technology and job creation needs

OVERALL RECOMMENDATION: MAKE NY THE EAST COAST MEDIA ZONE

Focus on Public/Private Partnership and Convergence of Traditional and Digital Media

Create districts throughout New York City that anchor an East Coast *Media Zone,* providing a "critical mass" of facilities and talent for film, television and broadband production

- **Support development of production and space for Traditional Media and wired office space for Digital Media**
- **Encourage increased government incentives, policies and priorities that target Traditional and Digital Media**
- **Focus on all stages of production and ensure cooperation between Traditional and Digital Media**

Foundation #1

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Foundation #2

Promote investment in education and public/private cooperation to prepare a workforce that can meet industry needs

- **Expand the technically proficient workforce through education programs**
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Foundation #3

Convene industry groups and others in a Visual Media Consortium

- **Expand efforts of private sector organizations focused on industry needs and issues**
- **Monitor NY's competitiveness with other localities**

Foundation #4

Launch joint industry/public sector marketing campaign to promote New York's commitment to the industry and underscore efforts to link digital and traditional media

FOUNDATION #1: HELP MEET THE SPACE AND CRITICAL MASS NEEDS OF TRADITIONAL AND DIGITAL MEDIA

Target public incentives to stimulate concentrated development of affordable, wired space in all parts of the Media Zone, for example:

- **Take Lower Manhattan IT District concept to newly identified locations in all boroughs**
- **Encourage telecom infrastructure/other service investment to create new 24/7 communities**
- **Concentrate efforts to create critical mass of talent and ideas in targeted districts**
- **Use incentives to promote renovated or new production and support services space as well as ongoing upgrades to space**
- **Engage Traditional Media in sponsorship and support of district development**
- **Set incentives to ensure success of each part of Media Zone, including:**
  - **Real Estate Incentives (ICIP- Industrial Commercial Incentive Program, IDA, etc.)**
  - **Energy Abatement Initiatives**
  - **Zoning changes**
  - **Utility (energy/telecom) GRT (Gross Receipt Tax) credit**
  - **Job Creation Tax Credits**
  - **Financing and Credit Enhancement**

Increase - where possible - the availability of publicly owned property for use by developers/ producers at low cost

- **For example, other localities provide low rent space for use as production location, soundstage or office, in return for investment in renovation**

Develop a package of neighborhood incentives throughout New York to encourage greater availability of film-ready, film-friendly production locations or film zones

FOUNDATION #2: PROMOTE INDUSTRY-EDUCATION-PUBLIC SECTOR ALLIANCES TO EXPAND LABOR POOL FOR INDUSTRY

Identify higher education institutions to be "education lighthouses" for each district of the Media Zone

- **Leverage links with faculty and students at New York's educational institutions, including CUNY, SUNY, Columbia , NYU, Brooklyn Polytechnic, Cooper Union, and others**
- **Work together to expand technology education programs**
- **Ensure NY educational institutions benefit from and help sustain NY's current advantaged position in nascent digital media**

Set joint public/private initiatives to promote technically savvy workforce

- **Industry/Educators jointly define needs for the future**
- **Educators develop programs for area with state and city support**
- **Encourage private sector support**
  - **Lecture series, course sponsorship, industry internship programs, funding for scholarships/ training programs /technology development**
- **Organize business incubator facilities linking universities, entrepreneurs and investors**

Link academic disciplines from universities with corporate institutions to ensure industry synergies

- **Bring together art, film school, theatre, technology and communication to realize full potential from New York's assets**

FOUNDATION #3: ESTABLISH VISUAL MEDIA CONSORTIUM TO SUPPORT INDUSTRY NEEDS

Leverage existing resources to connect key stakeholders in Media Zone

- Educational Institutions that provide intellectual capital and facilities
- Trade Associations, such as the New York New Media Association and the New York Production Alliance
- Venture capital firms and financial institutions
- Entertainment and technology/communications industry partners
- Labor/Unions
- Public sector and community representatives

Use the consortium to unite efforts of all stakeholders on key issues

- Research and accelerate the integration of technology into New York's entertainment industry
- Attract and retain film and technology talent, relocation assistance
- Coordinate effort to provide appropriate, affordable space for all media
- Launch new commercial technology ventures to support job creation
- Serve as sector intermediary to represent the many small businesses in the industry
- Explore Federal government initiatives for international parity through existing trade agreements
- Ensure growth of industry consortia consisting of corporations, small business, finance and academics to foster cooperation and investment

FOUNDATION #4: LAUNCH JOINT INDUSTRY AND PUBLIC SECTOR MARKETING CAMPAIGN

Highlight Cluster Advantages of New York

Promote the various districts in New York, including Manhattan's West Side (from Soho to Lincoln Center), Broadband Brooklyn (Downtown), the Upper Manhattan Technology District and the Long Island City Studios

- **Encourage development of entertainment technology in all the districts**

Develop a neighborhood-based marketing campaign

- **Describe public sector support for key neighborhoods to improve their utility for location shooting and to create small business opportunities**

Promote New York's advantages as a media center

- **Traditional Media**
  - **growing pool of technically focused talent**
  - **world class community of creative talent**
  - **highlight NY's status as an International Production Center (e.g., quality of crews, professional service, variety and depth of locations)**
- **Digital Media**
  - **critical mass of nascent companies and investment**
  - **growing pool of technically focused talent**
  - **innovation in expanding communication and technical infrastructure**

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NY TRADITIONAL MEDIA DIRECT EXPENDITURES

Analysis Summary

Method	Features	Television	Commercials	Other	Total
Current Methodology	**$2,033M**	$2,460M	$580M	**$68M**	$5,141M
Sample Budgets	$1,857M	**$2,104M**	**$816M**	-	$4,844M (1)
MPAA Approach	→	→	→	→	$4,499M
Decision:	$2,023M	$2,104M	$816M	$68M	$5,011M
Rationale:	Permit system captures close to 100% of principal photography	Bottom-up estimate on show by show basis	Bottom-up estimate for number of commercials produced in NY	Permit system only accurate source for data	
% of total:	40%	42%	16%	1%	100%

Shaded box (shown in bold): Represents best estimate for sector

(1) Includes $68M for other

Source: BCG analysis

TRADITIONAL MEDIA DIRECT EXPENDITURES

Method 1: Current Methodology

Features		Television		Commercials		Other	
Pre-production =	$248M	Pre-production =	$125M	Pre-production =	$13M	Pre-production =	$11M
Production =	993M	Production =	1,250M	Production =	413M	Production =	50M
Post-Production =	60M	Post-Production =	101M	Post-Production =	67M	Post-Production =	7M
Above-the-line costs	722M	Above-the-line costs	984M	Above-the-Line costs	87M		
Total	$2,023M	Total	$2,460M	Total	$580M	Total	$68M

Source: NYC Mayor's Office of Film, Theatre and Broadcasting 1998 statistics; AAAA Television Cost Survey; BCG interviews and analysis

TRADITIONAL MEDIA DIRECT EXPENDITURES

Method 2: Sample Budgets

Features

Budget size ($M)	# of films	Total direct expenditures 1998($M)
≤1	110	95
1 – 10	62	513
10 – 20	15	210
20 – 30	10	183
30 – 50	12	390
50+	14	466
Total	223	$1,857M

Television

Type of show	Total direct expenditures ($M)
News	1,047
Daytime	492
Primetime	254
Talk shows	311
Total	$2,104M

Commercials

	Estimate based on union data	Estimate based on AAAA data
Number of commercials produced	2,134	3,168
Average cost/ commercial	$308K	$308K
Total	$657M	$976M
Average	$816M	

Source: Internet Movie database; NYC Mayor's Office of Film, Theatre and Broadcasting; Electronic Media report (8/99); Local NY Union; AAAA Television Cost Survey - Report of 1997 findings; BCG interviews and analysis

TRADITIONAL MEDIA DIRECT EXPENDITURES
Method 3: MPAA Approach

	1998 ($M)
1998 estimated wages	**$1,800M**
• **Above-the-line talent**(1)	
• **Below-the-line talent**(2)	
Wages at 40% of total spending	
Total	**$4,499M**

(1) Includes actors, producers, writers, directors
(2) Includes camera operators, electrical, lighting, grips, hair and makeup, wardrobe, etc.
Source: BCG interviews, 1998 MPAA State of the Industry Report

NY TRADITIONAL MEDIA EMPLOYMENT

Analysis Summary

Method	Features	Television	Commercials	Other	Total Employment
Top Down					**41,145 jobs**
Sample Budgets	**8,334 jobs**	**11,767 jobs**	**5,696 jobs**		**25,798 jobs**
Standard Industrial Classification Codes					**54,276 jobs**

Decision: **70,000 jobs(1)**

Rationale: **Top Down method captures freelance worker community while SIC method captures primarily non-freelance workers, though overlap exists**

(1) Sum of top down and SIC methods is 95,421. The SIC number of 54,276 is adjusted upward by 29%, or 39% of the "Top Down" number, to provide a conservative estimate for the number of free lance workers employed that are not captured by the SIC data.

Source: BCG analysis

TRADITIONAL MEDIA EMPLOYMENT

Method 2: Sample Budgets

Features

Budget size ($M)	# of films	Number of jobs 1998
≤ 1	110	2,165
1 – 10	62	2,538
10 – 20	15	1,181
20 – 30	10	730
30 – 50	12	910
50+	14	810
Total	223	8,334

Television

Type of show	Number of jobs 1998
News	5,856
Daytime	2,753
Primetime	1,419
Talk shows	1,740
Total	11,768

Commercials

	Estimate based on union data	Estimate based on AAAA data
# commercials shot	2,134	3,168
Average man-days/ commercial	202	202
Number of jobs 1998	4,585	6,808
Average	5,696	

Source: NYC Mayor's Office of Film, Theatre and Broadcasting; Internet Movie Database; AAAA Television Cost Survey - Report of 1997 findings; BCG interviews and analysis

TRADITIONAL MEDIA EMPLOYMENT

Method 3: Standard Industrial Classification Code

SIC Codes		Total number of jobs - 1999	Estimated % for media sector	Total media sector employment
7812 -	Motion picture and video tape production(1)	22,707	92% (12 categories of 13)	20,890
7819 -	Services allied to motion picture production(2)	6,095	100% (15 categories of 15)	6,095
7922 -	Theatrical producers and theatrical services(3)	20,656	7% (2 categories of 28)	1,446
7929 -	Bands, orchestras, actors, and other entertainers and entertainment groups(4)	5,412	15% (2 categories of 15)	812
4833	Television broadcasting stations	15,041	100%	15,041
4841	Cable and other pay TV services	9,992	100%	9,992
			TOTAL	54,276 jobs

(1) Relevant media sectors: audiovisual motion picture program production, cartoon motion picture production, commercials/television tape or film production, educational motion picture production, industrial motion picture production, motion picture production and distribution, music video production, non-theatrical motion picture production, religious motion picture production, tape production (video or motion picture), television film production, training motion picture production

(2) Relevant media sectors: casting bureaus, motion picture; developing and printing of commercial motion picture film; directors, motion picture: independent; editing of motion picture film; film libraries, stock footage; film processing, motion picture; laboratories, motion picture; motion picture consultants; motion picture reproduction; rental of motion picture equipment; studio property rental for motion picture film production; television tape services (e.g., editing and transfers); titling of motion picture film; video tape or disk reproduction; wardrobe rental for motion picture film production

(3) Relevant media sectors: agents or managers for entertainers, television programs (including commercials) - live

(4) Relevant media sectors: actors, actresses

Source: NY Bureau of Labor Statistics

AGENDA

Executive summary

Media industry baseline analysis

Situational analysis - driving to recommendations

Recommendations

Appendix

- **Baseline analysis**
- **NY Film Commission incentives**

CURRENT NY FILM COMMISSION INCENTIVES

Services

- Free police
- No fee locations
- Free parking
- Free permits
- Location library (40,000+ images)
- Location lists
- Production assistance

Financial / Taxation

- 8.25% sales tax exemption
- Low interest loans (EDC)
- P.I.L.O.T. programs
- Empowerment zone incentives

Promotion

- Trade show participation
- Studio visits
- Advertising campaigns