



# The New York State Post-Production Ecosystem Executive Summary December 2016



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Post-production ecosystem generates significant benefits for New Yorkers.

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**11,260** people work in the post-production ecosystem, including **4,470** freelancers.

**35%** more people work in the post-production ecosystem than in **2004**.

**20%** of all US-based post-production firms call **New York State home**.

**\$83,400** average income, of which **40%** do not require a bachelor's degree.

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Post-production contributes meaningfully to the New York State economy.

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**Through economic multipliers the post-production ecosystem generates:**

**23,310**

total jobs

**\$1.87B**

income

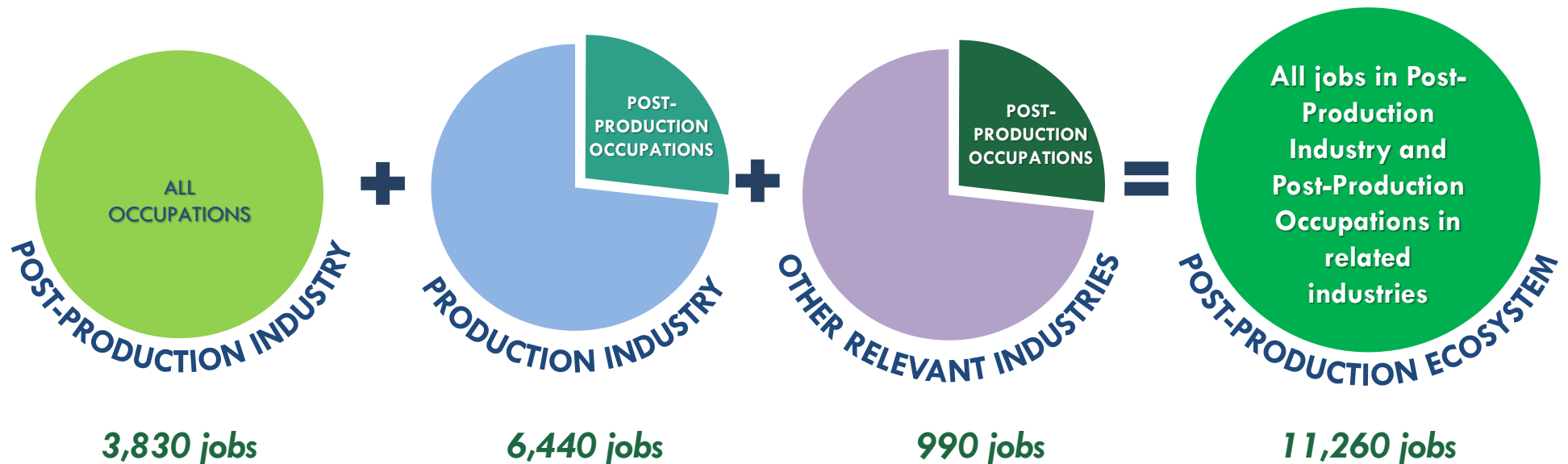
**\$128M**

NYS tax revenue

**\$7.06B**

economic output

The post-production ecosystem includes all jobs in the post-production industry and all post-production jobs in related industries.



**Example:**

A receptionist, accountant, or film & video editor at a post-production company

**Example:**

A film & video editor, composer, or software developer at a production company

**Example:**

A freelance multimedia artist or animator; a film and video editor at a music recording company

*Images not to scale.*



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Technological advancements, cost savings, and enhanced creative control are causing post-production to be increasingly intertwined with production.

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## **Picture**

Processing images, including editing and color correction.

## **Visual Effects**

Creating computer-generated imagery (CGI) and animation & adding captioning and titling.

## **Sound**

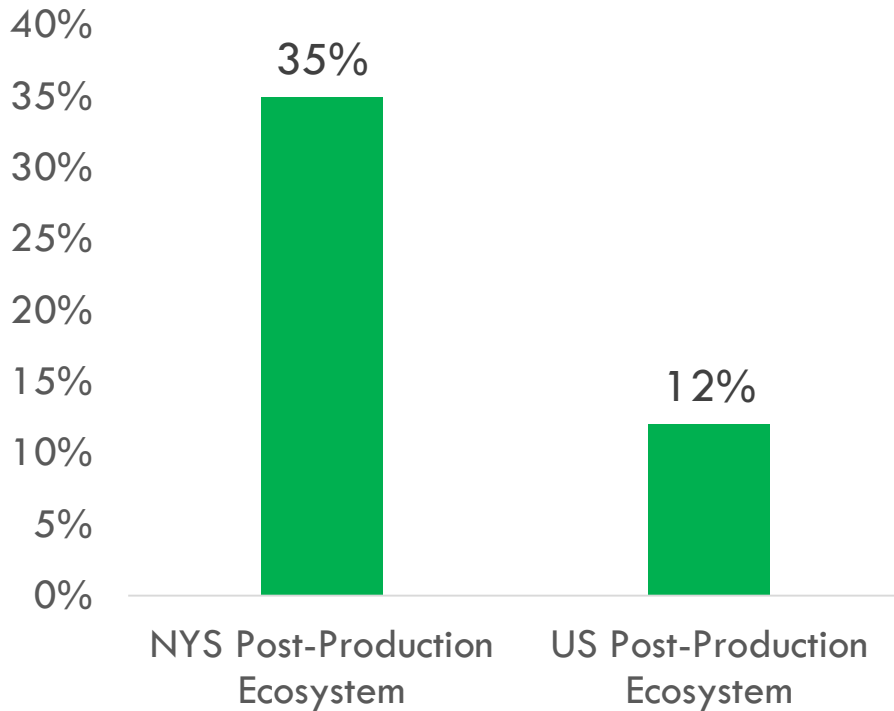
Recording & integrating sound elements in order to create a soundtrack matching a production's audio and images.

## **Music**

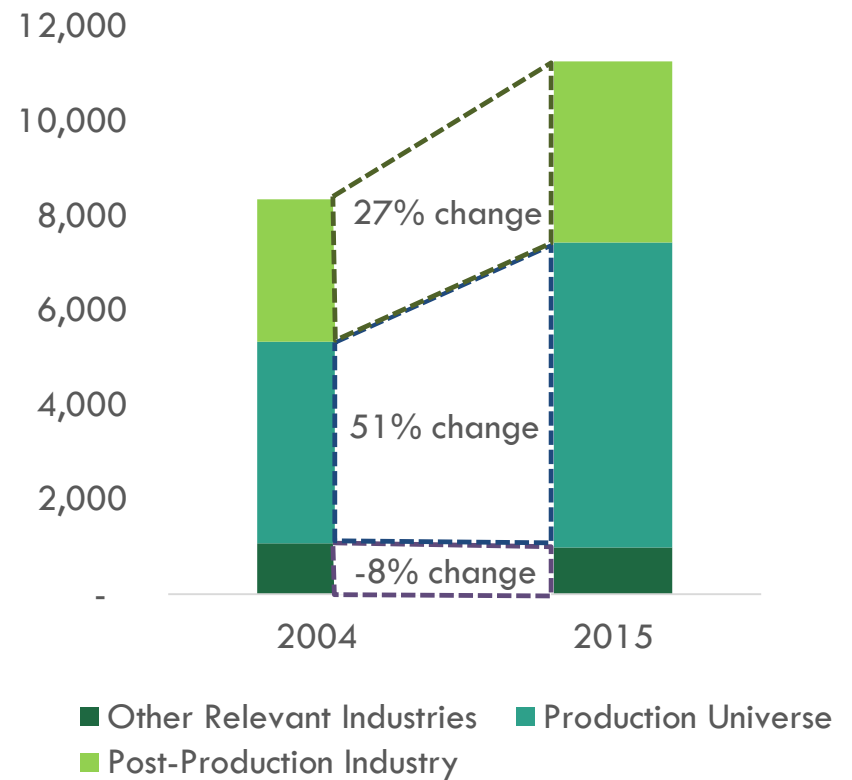
Arranging, recording, licensing, editing, and integrating music into a soundtrack.

Since 2004, New York State's post-production ecosystem has grown faster than the nation.

**NYS & U.S. Job Growth, 2004-2015**



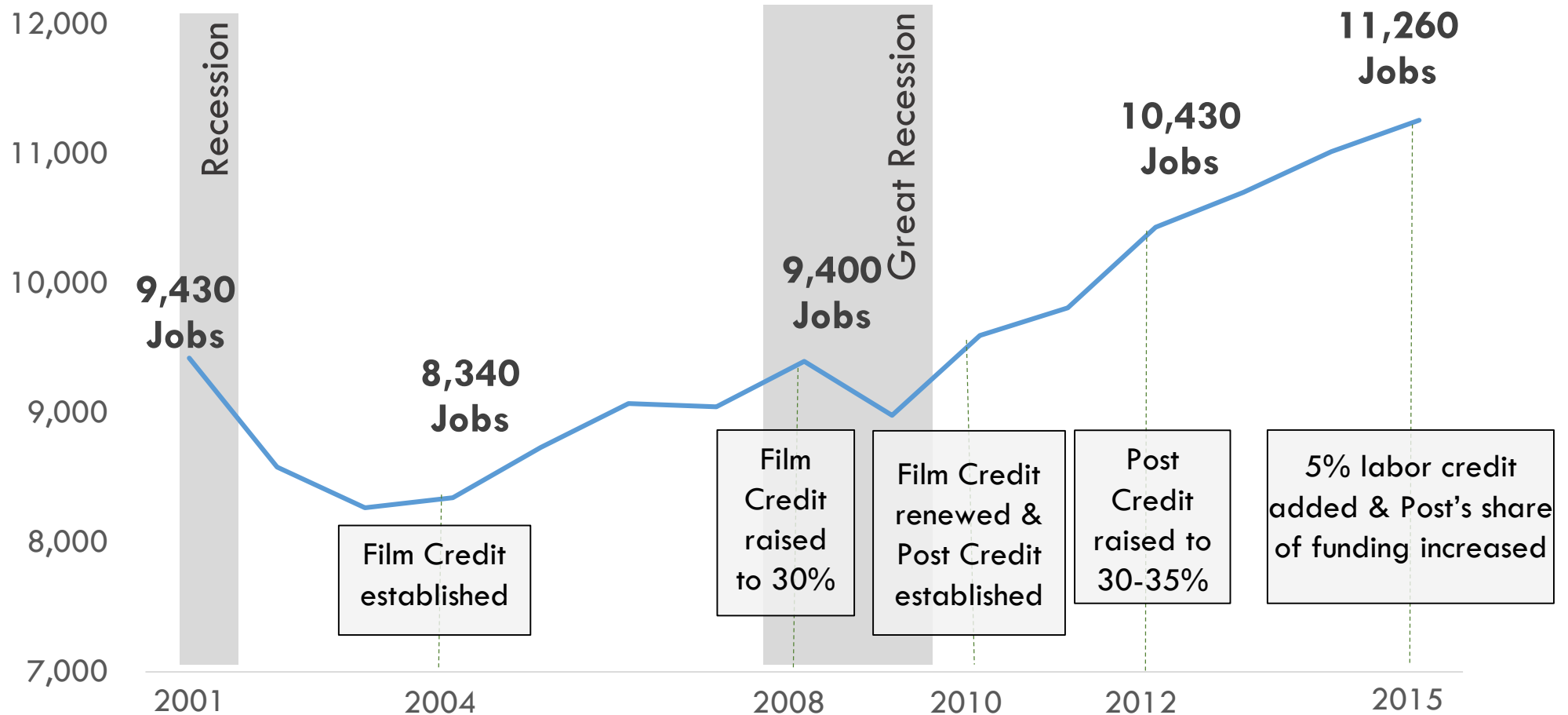
**NYS Post-Production Ecosystem Job Growth, 2001-2015**



EMSI data; HR&A analysis.

Over half of the new jobs were created since the Post-Production Credit was established in 2010.

## Post-Production Employment, 2001-2015



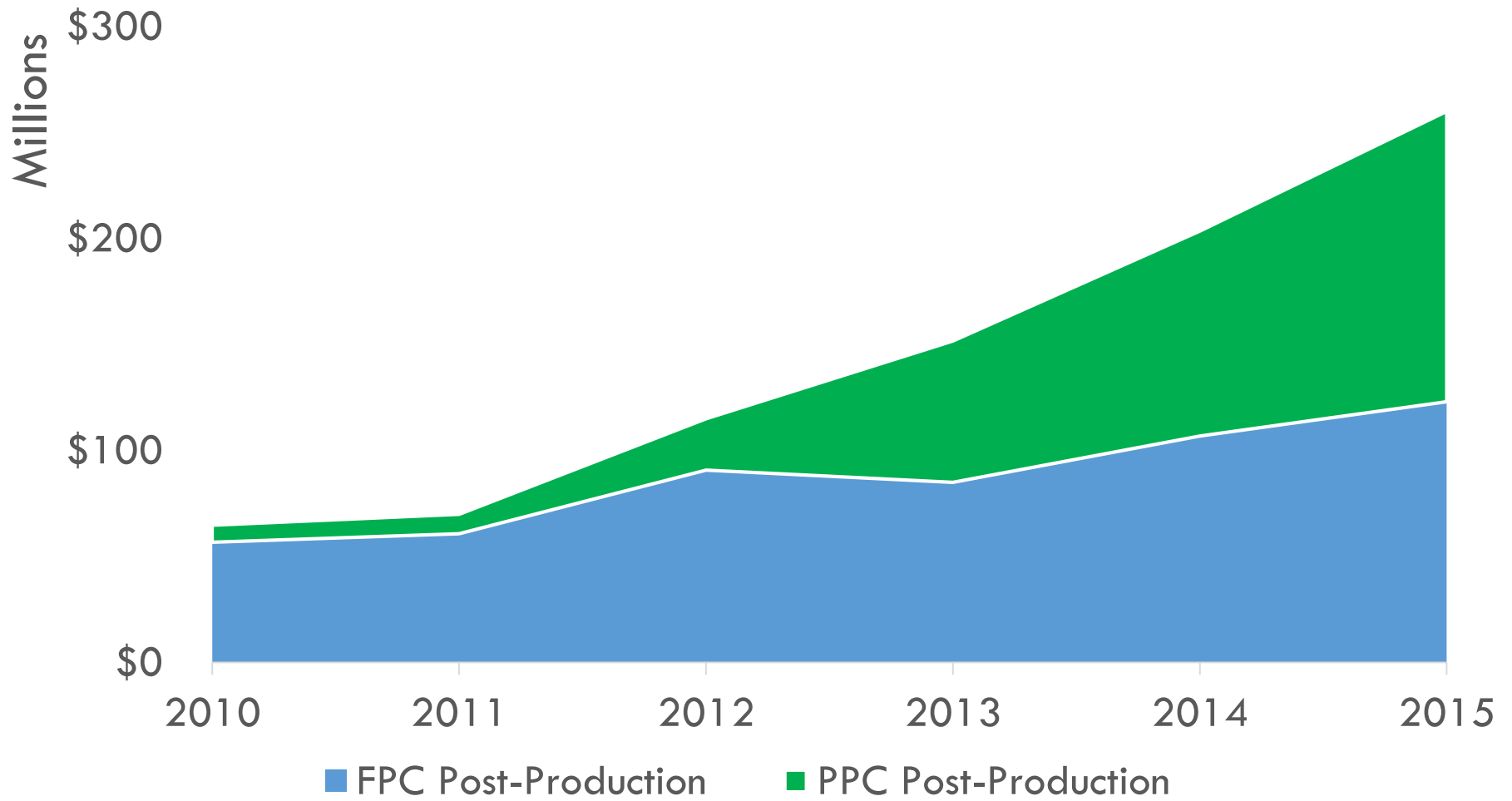
EMSI data; HR&A analysis.

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In-state post-production spending tied to the Credits increased by 300%.

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### Post-Production Spending Tied to the Credits, 2010-2015

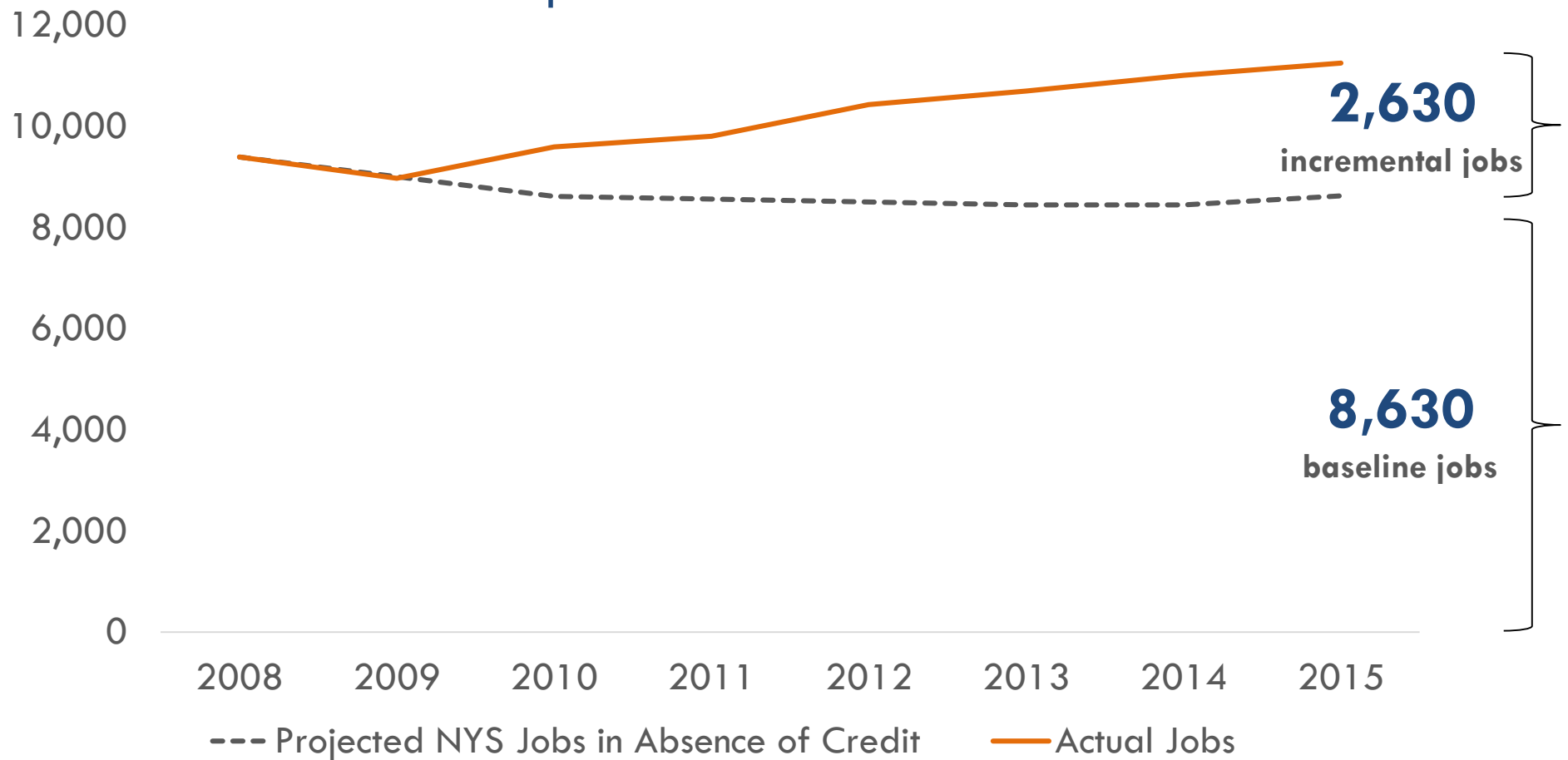


Source: Initially certified spending data from Empire State Development.



The Credits helped to create 2,630 new post-production jobs in NYS.

### Post-Production Ecosystem Employment, Projected and Actual 2008 - 2015

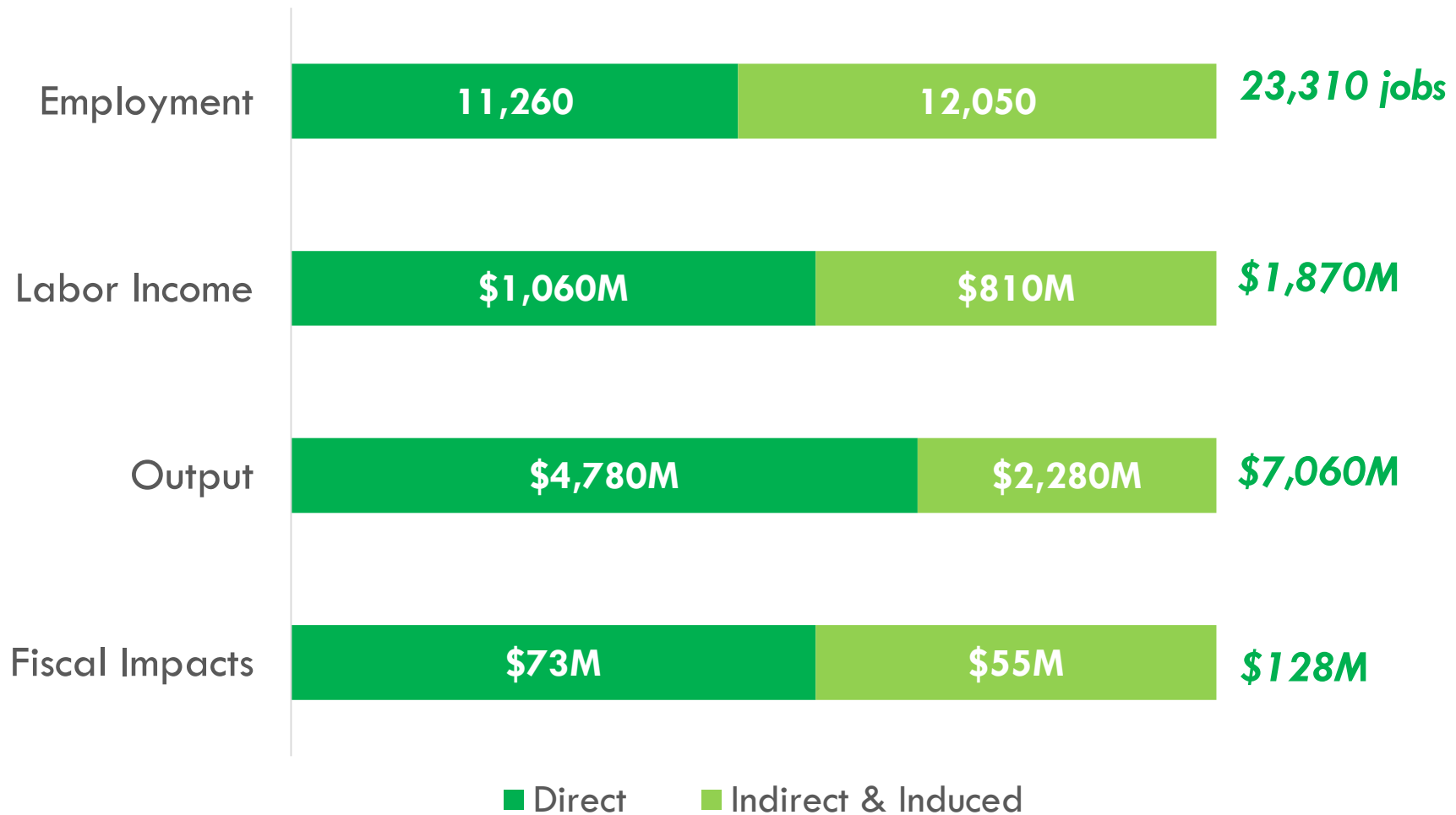


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For every job in the post-production ecosystem, 2.07 total jobs are ,  
created in the New York State economy.

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## Economic & Fiscal Impacts, 2015



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The Credits have helped New York State build upon its strengths and become a national leader in post-production.

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## Strengths

- Intensifying connections between production and post-production that are well-served by New York's status as a dual center for both
- Presence of a supportive tech industry in New York
- A growing project and capacity pipeline due to the rise of scripted television
- A desirable quality of life that is attractive to talent

## Challenges

- High costs of doing business in New York, including real estate and wages
- Local industry "growing pains" associated with limited capacity
- A competitive, globalized industry

**The Film Production and Post Production Credits address cost constraints, induce workforce development, and improve New York State's competitiveness.**



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