

Economic and Fiscal Impact

WESTCHESTER COUNTY FILM INDUSTRY 2024

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PREPARED FOR:

Westchester County Tourism and Film
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EXECUTIVE SUMMARY

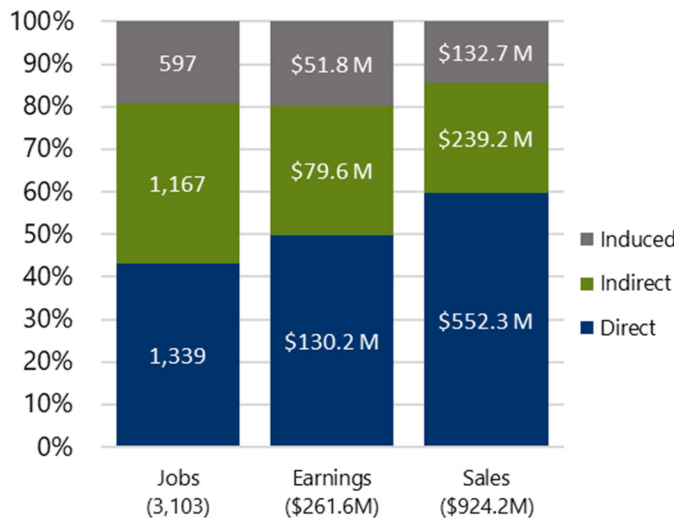
Westchester County Tourism and Film commissioned Camoin Associates to analyze the film industry's economic impact on Westchester County in 2024. The economic and fiscal impact analysis includes jobs, wages, sales, and municipal revenues from the film industry's activity in Westchester County. Jobs created by the film industry and filled by County residents are the "direct effect" of the industry in Westchester County. The direct effects circulate through the economy of the County, causing additional follow-on impacts in the form of "indirect and induced effects," namely (a) spending by businesses impacted by the direct effects and (b) spending of employees of those direct and indirect businesses on local goods and services.

Key Findings

- **The industry created an estimated 1,339 direct local jobs in 2024.** These jobs resulted in the creation of indirect and induced jobs in the county and associated worker earnings and sales.
- **The total economic impact of the film industry on Westchester County in 2024 was 3,103 jobs, \$261.6 million in employee earnings, and \$924.2 million in sales.** These economic impacts were associated with over \$7.6 million in tax and other revenue for the County and its municipalities.

Figure 1

Economic Impact of the Film Industry on Westchester County, 2024



Source: Lightcast, Camoin Associates



INTRODUCTION

Camoin Associates has conducted an annual economic and fiscal impact analysis of the film industry in Westchester County for Westchester County Tourism and Film (the Client) since 2020 to track year-over-year impacts of the industry on the County. By monitoring these trends over time, the County gains valuable insight into the film sector's growth, underlying drivers, and evolving dynamics. The findings also support informed decision-making around funding, incentives, and policy initiatives aimed at fostering the industry's strategic development.

The economic and fiscal impact analysis includes jobs, wages, sales, and county and selected municipal revenues resulting from the film industry in Westchester County.

The County benefits from the film industry's impact in a number of ways:

- Ongoing economic impacts resulting from film production jobs within the county.
- Fiscal benefits, including sales and hotel occupancy taxes generated by the industry.
- Screen-induced tourism activity and greater brand awareness.

Modeling Software

Lightcast designed the input-output model used in this analysis. The Lightcast model allows the analyst to input the amount of new direct economic activity (spending, earnings, or jobs) occurring within the region and uses the direct inputs to estimate the spillover effects that the net new spending, earnings, or jobs have as these new dollars circulate throughout the economy. This is captured in the indirect and induced impacts and is commonly referred to as the "multiplier effect." See Appendix A for more information on economic impact analysis.

What does "net new" mean?

When looking at the economic impacts of an industry, it is important to look only at the economic changes that would not happen in the scenario's absence. These effects are the "net new" effect: purchases made only as a result of the company or project in question.

Definition of a "job"

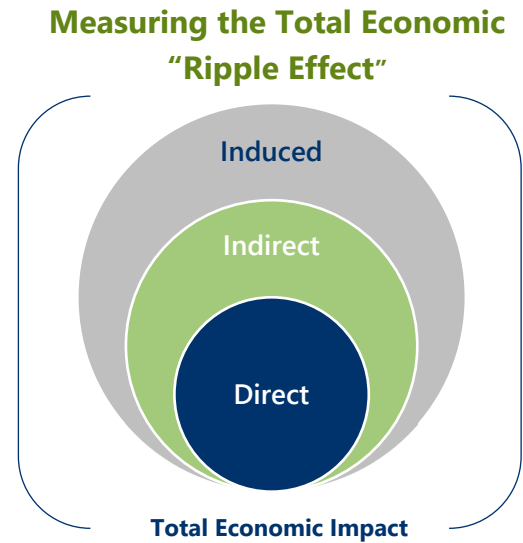
A "job" is equal to one person employed for some amount of time (part-time, full-time, or temporary) during the study period.



Methodology

An economic impact analysis was conducted to quantify the impact on the County. The economic impact includes “direct” economic impacts, such as on-site jobs, and secondary economic impacts generated throughout the economy through the economic “ripple” effect. The three specific types of impacts considered in the analysis include:

- **Direct:** The most immediate impacts include the on-site jobs and the local spending on goods and services (including during construction).
- **Indirect:** Indirect effects occur at businesses within the County that supply goods and services to the industry and re-spend a portion of that revenue. In other words, for every dollar spent at a local supplier, a portion of that dollar will again be spent on goods and services at other businesses in the city. This is considered the indirect effect.
- **Induced:** Another “ripple” effect occurs when workers in the industry and indirectly impacted businesses spend a portion of their wages at businesses within the County for things such as retail goods and services. The portion of the spending by new businesses that is paid to workers and re-spent in the County economy is considered the induced impact.



The sum of the direct, indirect, and induced impacts equals the total economic impact. The Lightcast Input-Output model calculates the total economic impact, including the three different types of impacts.

Survey

To understand more about the industry’s activity, Westchester County supplemented its own data on filming at County-owned locations by surveying its municipalities and popular filming locations to understand annual activity better. Thirty-five (35) municipalities and other jurisdictions and forty-nine (49) private, nonprofit, and educational filming locations responded to the survey.

The survey elicited information on the number of production days for film, television, commercials, and other production types in 2024. Respondents reported a total of 1,372 production days in 2024 in Westchester County. This information was combined with additional research and assumptions about jobs per production and the portion of jobs filled by County residents to determine the total local jobs resulting from the film industry. Employment at a representative post-production facility was also included.

ECONOMIC IMPACTS

The estimates of direct employment for production and post-production jobs were used to calculate the direct inputs for the economic impact model. Camoin Associates used the input-output model designed by Lightcast. Lightcast allows the analyst to input the amount of net new direct economic activity (in this case, jobs) occurring within the County and uses the direct inputs to estimate the spillover effects that the new activity generates as it circulates through the Westchester County economy. This is captured in the indirect and induced impacts and is commonly called the “multiplier effect.” See Attachment A for more information on economic impact analysis.

DIRECT JOBS

The first step of the analysis is to determine the number of film industry jobs in the county. In the Westchester County Tourism and Film survey, municipalities reported 451 production days in 2024, while businesses and locations reported 804. In addition, Westchester County reported 117 production days in 2024 based on data from its production permitting records. This yields 1,372 production days in 2024, broken out by production type, as shown below.

Survey responses and industry data from Lightcast indicate that Westchester County residents fill 22% of film jobs. Converting work days to job years, multiplying by 22%, leads to **1,339 Westchester County jobs in 2024¹**, the direct inputs in the model. Table 1 illustrates how production days translate into “job years” to calculate the number of employees working in the film industry.

Table 1

Westchester County Local Film Jobs, 2024

Type of Production	Production Days	Avg. Jobs per Production	Days of Work
Film	357	533	190,204
Television	683	1,935	1,322,282
Commercial	150	174	26,182
Other (e.g., music video)	181	174	31,518
Total	1,372	2,816	1,570,186
Total Job Years*			6,039
Local Jobs**			22%
Total Local Jobs			1,339

* Equals total days of work divided by 260 (5 working days per week x 52 weeks).

** Analysis uses results from previous surveys due to limited response to this question in most recent survey.

Source: Camoin Associates survey, New York State ESD Film Tax Credit quarterly reports, Lightcast

¹ Total Westchester County jobs also include identified jobs at post-production facilities in the County.



TOTAL IMPACT

The table below outlines the film industry's economic impact on Westchester County in 2024. As shown in Table 2, the 1,339 jobs in 2024 generated \$130.2 million in direct earnings within the industry in Westchester County. Considering the additional indirect and induced economic impacts on the county from those direct jobs, total employment created by the industry is estimated at 3,103 jobs with \$261.6 million in earnings over this period. The film industry also generated \$924.2 million in sales in the county in 2024.

Between 2023 and 2024, Westchester County's film industry experienced an economic resurgence across all key indicators. This upward trend occurred following major industry disruptions in 2023, when both the Writers Guild of America and SAG-AFTRA initiated strikes that lasted more than five months and halted film and television production nationwide, including in Westchester County.

The most notable impact was the total number of jobs generated by the industry, which jumped from 2,053 in 2023 to 3,103 in 2024, representing a 51% increase. This surge reflects the expanding employment opportunities, both directly within the industry and indirectly through related sectors, such as hospitality, transportation, and equipment services. The direct impacts of the film industry in Westchester County experienced the most substantial growth, with direct jobs more than doubling, from 601 in 2023 to 1,339 in 2024. Direct earnings increased by over \$34.8 million, while sales revenue surged by nearly \$199 million, a 56% increase.

Table 2

Economic Impact of Westchester County Film Industry, 2024

	Jobs	Earnings	Sales
Direct	1,339	\$130,188,142	\$552,295,133
Indirect	1,167	\$79,576,121	\$239,204,747
Induced	597	\$51,814,373	\$132,729,392
Total	3,103	\$261,578,635	\$924,229,272

Source: Lightcast, Camoin Associates



FISCAL IMPACTS

In addition to the film industry's economic impact on the local economy outlined above, there is also a fiscal impact in terms of sales and hotel taxes generated. The following section outlines the industry's impact on the County's revenue sources.

SALES TAX REVENUE

The additional earnings described by the total economic impact of the film industry (see the previous section) lead to additional sales tax revenue for the County. Using the same calculation as in years past, it is assumed that 70%² of the earnings are spent within Westchester County, and 25%³ of those purchases are taxable. Westchester County has a 4.0% total sales tax rate, with the distribution of that tax determined by a specific revenue-sharing structure. Here's how the sales tax proceeds are divided:

- The first 1.50% is fully retained by the County.
- For the next 1.00%, the County keeps one-third (33.33%) and distributes the rest to towns, villages, and cities based on population.
- The following 0.50% and the final 1.00% are distributed, with 70% retained by the County and the remaining 30% shared among towns, villages, and cities.

Using this breakdown, the following table shows how much sales tax revenue is estimated to be generated in 2024:

Table 3

Sales Tax Revenue, 2024	
	Amount
Total Earnings	\$261,578,635
Amount Spent in County (70%)	\$183,105,045
Amount Taxable (25%)	\$65,394,659
Total County Sales Tax Rate	4.0%
Total County Sales Tax Revenue	\$2,615,786
County Sales Tax Maintained by the County	72.50%
County Sales Tax Distributed to Local Jurisdictions	27.50%
Westchester County Sales Tax Revenue	\$1,896,445
Local Jurisdictions Sales Tax Revenue	\$719,341

Source: Office of the New York State Comptroller, Lightcast, Camoin Associates

Under these assumptions, in 2024, the County received \$2.6 million in sales tax revenue from the economic impacts of the film industry, distributing \$719,341 to local jurisdictions and retaining the rest.

² Based on an analysis of the availability of industry goods and services in Westchester County, according to Lightcast.

³ Based on a review of consumer spending habits and the percent of total purchases that are on taxable goods.



IMPACT OF LODGING (OCCUPANCY AND SALES TAX)

In addition to the sales tax revenue, Westchester County also received additional occupancy tax and sales tax revenue from the production employees who stay in the area at lodging facilities. Hotels included in the location survey reported 850 room nights booked in 2024 because of film productions. However, this figure is assumed not to capture the full amount of hotel stays. Therefore, since 22% of employees are estimated to be from Westchester County, 78% of the total production employees are from out of the county. Of those 78%, 15% are assumed to stay locally in hotels and/or extended stay facilities. Consequently, 11.7% of total employees are from out of the County and stay in hotels, contributing to hotel spending and hotel tax revenue. The tables below calculate the total number of hotel stays generated by the County's film industry in 2024.

Table 4

Total Number of Hotel Nights, 2024

Type of Production	Days of Work	Hotel Nights (11.7%)
Film	190,204	22,254
Television	1,322,282	154,707
Commercial	26,182	3,063
Other (e.g., music video)	31,518	3,688
Total	1,570,186	183,712

Source: Lightcast, Camoin Associates

Film Production Industry Trends

The film industry experienced significant turbulence in 2023, marked by strikes by the Writers Guild of America and SAG-AFTRA. These labor actions—driven by concerns over streaming residuals, artificial intelligence, staffing levels, and working conditions—led to a production halt across the United States. The strikes, which lasted several months, disrupted content pipelines and had a profound economic impact. While the work stoppages created uncertainty across the industry, the eventual resolution of both strikes marked a turning point, and by late 2023, production had begun to rebound.

Though the industry remains cautiously optimistic following the strikes, the post-strike recovery has not been without its challenges. With production timelines delayed, release schedules compressed, and budgets tighter, studios have become more selective about what and where they shoot, fueling heightened competition among states and regions. In response, locations across the globe are enhancing incentive packages, upgrading infrastructure, and streamlining permitting processes to attract production dollars, creating a fiercely competitive landscape.

Westchester County has remained resilient amid these challenges, thanks to years of cultivating a film-friendly environment through responsive local leadership, effective policy, and a shared understanding that film production is an important business for the region. The County's diverse locations, proximity to New York City, and welcoming policies continue to position it as a highly attractive destination for filmmakers.

Looking ahead, there is cause for continued optimism. As the industry stabilizes, regions like Westchester that have made long-term investments in supporting film are well-positioned to thrive. By staying aware of emerging trends, adapting when necessary, and welcoming productions with great service and local support, Westchester can remain a premier destination for storytelling. Film production is not only a cultural asset; it's a powerful economic engine for the region.



To determine the total lodging-related revenue for the County, we assume an average hotel rate of \$173 per night in 2024⁴. The County has a 3% occupancy tax, and most local jurisdictions do as well. In addition, there is sales tax generated and distributed as a result of this lodging-related spending.

Table 5

Occupancy Tax Revenue, 2024

	Amount
Number of Hotel Nights	183,712
Average Cost of a Hotel	\$173
Annual Hotel Spending	\$31,782,133
Westchester County Occupancy Tax	3.00%
Average Local Occupancy Tax	3.00%
Westchester County Occupancy Tax Revenue	\$953,464
Local Jurisdictions Occupancy Tax Revenue	\$953,464

Lodging Related Sales Tax Revenue, 2024

	Amount
Number of Hotel Nights	183,712
Average Cost of a Hotel	\$173
Annual Hotel Spending	\$31,782,133
Total County Sales Tax Rate	4.00%
Total County Sales Tax Revenue	\$1,271,285
County Sales Tax Maintained by the County	72.50%
County Sales Tax Distributed to Local Jurisdictions	27.50%
Westchester County Sales Tax Revenue	\$921,682
Local Jurisdictions Sales Tax Revenue	\$349,603

Source: CoStar, Camoin Associates

⁴ CoStar 12-month average daily rates for Westchester County.



ADDITIONAL REVENUE

Beyond hiring local cast and crew members, film production companies also pay municipal, county location and permit fees, and private property rental fees for the use of locations. Surveyed municipalities and Westchester County reported total film production revenues of nearly \$1.8 million in 2024.

Table 6

Revenues Collected from Filming

	2024
Westchester County	\$400,809
Municipalities	\$1,395,886
Total	\$1,796,696

Source: Camoin Associates survey, Westchester County

TOTAL FISCAL BENEFIT

The following tables summarize the total fiscal benefits of the film industry to Westchester County in 2024. Note that these include revenue to the County and its municipalities.⁵

The film industry's total fiscal impact has rebounded since industry activity declined in 2023 due to the Writers Guild and SAG-AFTRA strikes. The total fiscal impact increased by 54% from \$4.4 million in 2023 to \$7.6 million in 2024.

Table 7

Total Fiscal Impacts of the Film Industry in Westchester County, 2024

Source	County	Local	Total
Sales Tax Revenue	\$1.9M	\$0.7M	\$2.6M
Occupancy Tax Revenue	\$1.0M	\$1.0M	\$1.9M
Lodging-Related Sales Tax	\$0.9M	\$0.3M	\$1.3M
Additional Revenue	\$0.4M	\$1.4M	\$1.8M
Total	\$4.2M	\$3.4M	\$7.6M

Source: Lightcast, Camoin Associates

⁵ Note: Breakdown of the sales tax revenue to the municipalities based on the established distribution formula has not been completed in past reports.



TOURISM-RELATED IMPACTS

Tourists are often drawn to places they have seen on screen, whether in film, television, commercials, or online content. These visual portrayals spark interest and create emotional and cultural connections that inspire real-world travel decisions. This phenomenon, known as film-induced tourism, has become an increasingly powerful driver of visitor activity and local economic growth.

A 2024 *Journal of Urban Economics* study found that the release of a television series led to a fourfold increase in tourism to the featured area and a 2.5x boost in tourist spending.⁶ Such content gives destinations increased visibility and competitiveness in the global tourism market. According to a survey from the Association of Film Commissioners International, 10% of travelers choose a destination based on a movie's setting, underscoring the influence of filmed media on consumer behavior.⁷

Importantly, the impact of film tourism is not confined to a movie's box office lifespan—it persists for years, even decades. Analysts have referred to this as the “long tail of content”: the ongoing cultural and economic returns from content that continues to circulate via streaming, syndication, and online platforms. Unlike traditional advertising, which fades quickly, iconic films and series function as evergreen marketing assets, embedding themselves in the public consciousness and continuously drawing fans to associated locations.

Further studies indicate that films that involve an emotional experience that link the storyline with the location are particularly successful in generating tourism.⁸ This link becomes the driving factor that compels the audience to visit the film site and share in the experience portrayed by the film. Ultimately, more successful feature films can be cited as impacting visitation to the area.

Westchester County, just north of New York City, has evolved into a major filming destination offering a diversity of backdrops—from modern cityscapes and upscale neighborhoods to historic estates, farms, beaches, and wooded landscapes. This visual range allows it to stand in for various eras and locations, making it an attractive hub for film and television producers. Westchester has provided the background for films such as *Maestro*, *Leave the World Behind*, and *Big*, as well as recent television shows such as *Elsbeth*, *Your Friends and Neighbors*, *Severance*, *Succession*, and *Zero Day*.⁹ This exposure can lead to an influx of tourists hoping to visit the locations where their favorite films and television shows have been filmed.

Furthermore, locations that evoke emotional resonance through storyline connections are particularly effective in driving visitation. When audiences associate a destination with a character's journey, an iconic scene, or a compelling narrative, they are more likely to seek out that place to relive or experience the moment for themselves.

⁶ Samuel Nocito, Marcello Sartarelli, and Francesco Sobbrino, “A Beam of Light: Media, Tourism and Economic Development,” *Journal of Urban Economics*, Volume 137.

⁷ “Popular Movies Can Increase Tourism to the Film's Location Between 25%-300%.” *Champion Traveler*. Retrieved from: <https://championtraveler.com/news/popular-movies-can-increase-tourism-to-the-films-location-between-25-300/>

⁸ Anna Niziol, “Film Tourism as a New Way to Market a Destination,” *Scientific Review of Physical Culture*, Volume 5 Issue 4.

⁹ *Filmed in Westchester*. Westchester County Tourism & Film. Retrieved from: <https://www.visitwestchesterny.com/film/filmed-in-westchester/>



While Westchester currently does not offer a studio tour experience, the organic, decentralized film tourism model it represents—where people visit individual sites seen on screen—still delivers measurable benefits. As seen in the table below, in 2024, the local film industry directly supported 495 tourism-related jobs in Westchester County.

Table 8

Tourism-Related Impacts, 2024

Industry	Jobs	Share
44 - Retail Trade	45	1%
71 - Arts, Entertainment, and Recreation	394	13%
72 - Accommodation and Food Services	57	2%
Total	495	16%

Source: Lightcast, Camoin Associates



APPENDIX A: WHAT IS ECONOMIC IMPACT ANALYSIS?

An economic impact study aims to ascertain the total cumulative changes in employment, earnings, and sales in a given economy due to some initial “change in final demand”. To understand the meaning of “change in final demand,” consider the installation of a new widget manufacturer in Anytown, USA. The widget manufacturer sells \$1 million worth of its widgets per year exclusively to consumers in Canada. Therefore, the annual change in final demand in the United States is \$1 million because dollars are flowing in from outside the United States and are, therefore, “new” dollars in the economy.

This change in final demand translates into the first round of buying and selling in an economy. For example, the widget manufacturer must buy its inputs of production (electricity, steel, etc.), lease or purchase property, and pay its workers. This first round is commonly referred to as the “Direct Effects” of the change in final demand and is the basis of additional rounds of buying and selling described below.

To continue this example, the widget manufacturer’s vendors (the supplier of electricity and the supplier of steel) will enjoy additional output (i.e., sales) that will sustain their businesses and cause them to make additional purchases in the economy. The steel producer will need more pig iron and the electric company will purchase additional power from generation entities. In this second round, some of those additional purchases will be made in the US economy and some will “leak out”. What remains will cause a third round (with leakage) and a fourth (and so on) in ever-diminishing rounds of industry-to-industry purchases. Finally, the widget manufacturer has employees who will naturally spend their wages. Again, those wages spent will either be for local goods and services or will “leak” out of the economy. The purchases of local goods and services will then stimulate other local economic activity. Together, these effects are referred to as the “Indirect Effects” of the change in final demand.


Therefore, the total economic impact resulting from the new widget manufacturer is the initial \$1 million of new money (i.e., Direct Effects) flowing in the US economy, plus the Indirect Effects. The ratio of Total Effects to Direct Effects is called the “multiplier effect” and is often reported as a dollar-of-impact per dollar-of-change. Therefore, a multiplier of 2.4 means that for every dollar (\$1) of change in final demand, an additional \$1.40 of indirect economic activity occurs for a total of \$2.40.


Key information for the reader to retain is that this type of analysis requires rigorous and careful consideration of the geography selected (i.e., how the “local economy” is defined) and the implications of the geography on the computation of the change in final demand. If this analysis wanted to consider the impact of the widget manufacturer on the entire North American continent, it would have to conclude that the change in final demand is zero and therefore the economic impact is zero. This is because the \$1 million of widgets being purchased by Canadians is not causing total North American demand to increase by \$1 million. Presumably, those Canadian purchasers will have \$1 million less to spend on other items and the effects of additional widget production will be cancelled out by a commensurate reduction in the purchases of other goods and services.

Changes in final demand, and therefore Direct Effects, can occur in a number of circumstances. The above example is easiest to understand: the effect of a manufacturer producing locally but selling globally. If, however, 100% of domestic demand for a good is being met by foreign suppliers (say, DVD players being imported into the US from Korea and Japan), locating a manufacturer of DVD players in the US will cause a change in final demand because all of those dollars currently leaving the US economy will instead remain. A situation can be envisioned whereby a producer is serving both local and foreign demand, and an impact analysis would have to be careful in calculating how many “new” dollars the producer would be causing to occur domestically.



APPENDIX B: DATA SOURCES

 **Lightcast** (formerly Emsi Burning Glass) is a global leader in labor market analytics, offering a data platform that gives a comprehensive, nuanced, and up-to-date picture of labor markets at all scales from national to local. Key components of the platform include traditional labor market information, job postings analytics, talent profile data, compensation data, and skills analytics. Lightcast integrates government data with information from online job postings, talent profiles, and resumes to produce timely intelligence on the state of the labor market. Job and compensation data is available by industry, occupation, educational program, and skill type. [Click to learn more.](#)

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ABOUT CAMOIN ASSOCIATES

Camoin Associates has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin Associates has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus), and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 46 states and garnered attention from national media outlets, including Marketplace (NPR), CNBC, Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal.

To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com.

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