

# COMMUNICATIONS & MEDIA

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## Summary

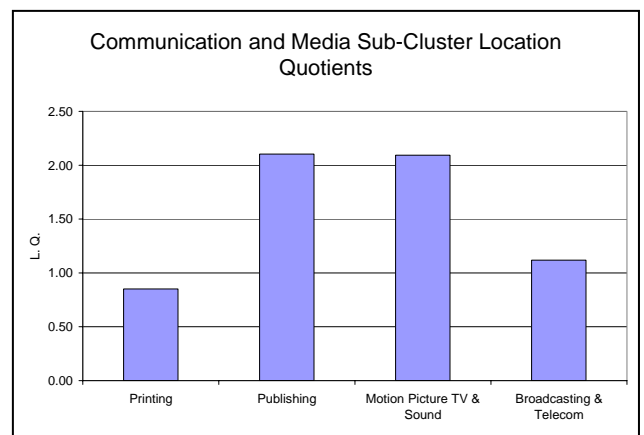
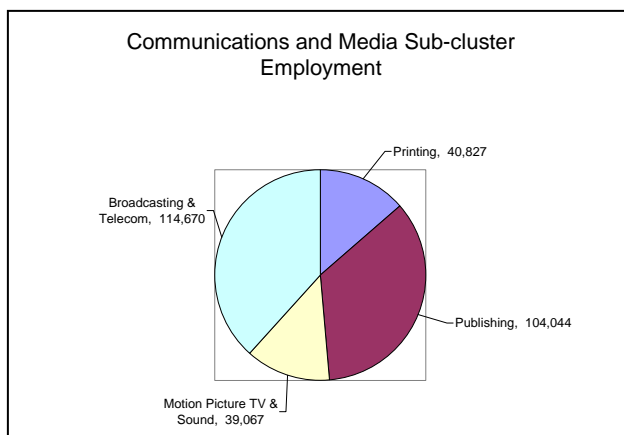
- Using data from the North American Industry Classification System and ESD's own analysis, New York's Communications and Media Services industry cluster has been defined to include four major sub-clusters:
  - printing; employing 38,224;
  - publishing, employing 99,421;
  - motion pictures, television and sound recording, employing 41,758;
  - broadcasting and telecommunications, employing 107,985..
- New York businesses in the Communications and Media Cluster employ more than 287,000 people at more than 11,000 establishments. Most New York employment in communications and media is downstate. 178,000 of those employed in communications and media are located in New York City, with an additional 45,000 on Long Island and in the Mid-Hudson region.
- In two of the four Communications and Media Services sub-clusters – Publishing and Motion Pictures, Television and Sound Recording, New York State shows a concentration of employment that is more than twice as great as the nation as a whole.
- In the telecommunications sub-cluster, New York State shows a concentration of employment that is about ten percent greater than the nation as a whole.
- In New York State, communications and media services employment is most concentrated in New York City, which has a location quotient of 1.86. The Mohawk Valley also has a somewhat greater concentration of employment (LQ=1.2) in this cluster than the nation as a whole.

## Overview

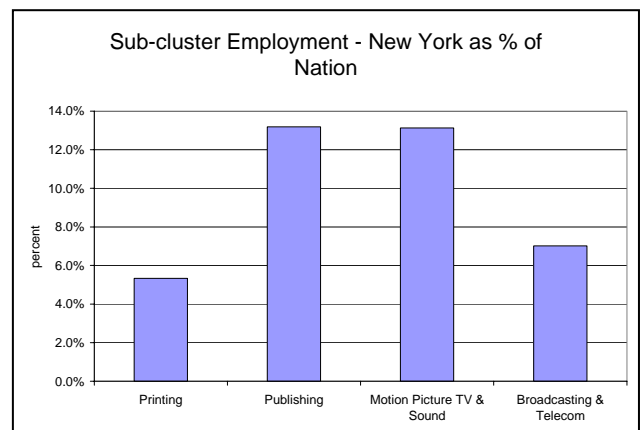
The Communications and Media cluster consists of four related sub-clusters:

- **Printing** includes commercial printers using lithographic, gravure, flexographic, and screen printing processes. In addition, quick printers, digital printers, business forms printers, book printers, producers of blankbooks, looseleaf binders, other commercial printers, tradebinders, and firms offering pre-press services are included.
- **Publishing** includes publishers of newspapers, periodicals, books, database and directory publishers, greeting card publishers, other publishers, news syndicates, libraries and archives, and all other information services.
- **Motion Picture and Sound Recording Industries** include motion picture and video production and distribution, teleproduction and other post-production services, record production and distribution, music publishers, sound recording studios, other sound recording industries, software reproducing, prerecorded compact disks (except software) and magnetic and optical recording media.
- **Broadcasting and Telecommunications** includes radio networks, radio stations, television broadcasting, cable and other program distribution, wired telecommunications carriers, paging, cellular and other wireless telecommunications, telecommunications resellers, satellite telecommunications, cable and other program distribution, and other telecommunications.

New York's employment and employment concentrations in the four sub-clusters are shown below:



Although communication and media employment is greatest in the broadcasting and telecommunications and publishing sub-clusters in New York State, New York sub-cluster employment is most concentrated in the motion pictures, television and sound recording, and publishing sub-clusters. These concentrations reflect New York's dominant position as a media capital in the United States and world-wide. In fact, New York has more than 13% of national



employment in publishing and motion pictures, TV and sound recording, despite having only about 7% of the nation's population.

Employment in New York's Communications and Media Cluster

Although the industries making up New York's communications and media cluster are related by shared worker skills, buyer and supplier relationships, geographic employment patterns differ significantly between the major communications and media sub-clusters. In this section major characteristics of the sub-clusters in New York State are reviewed.

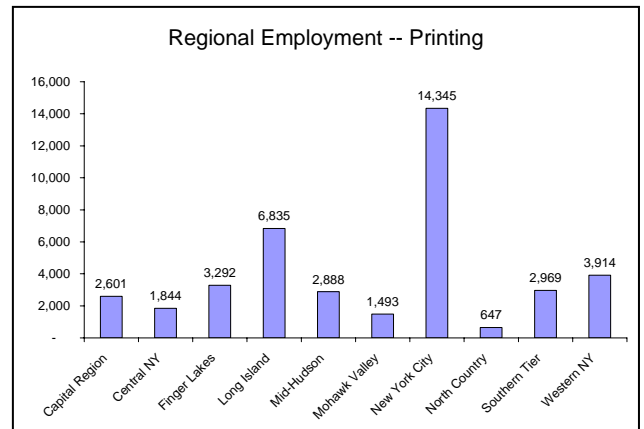
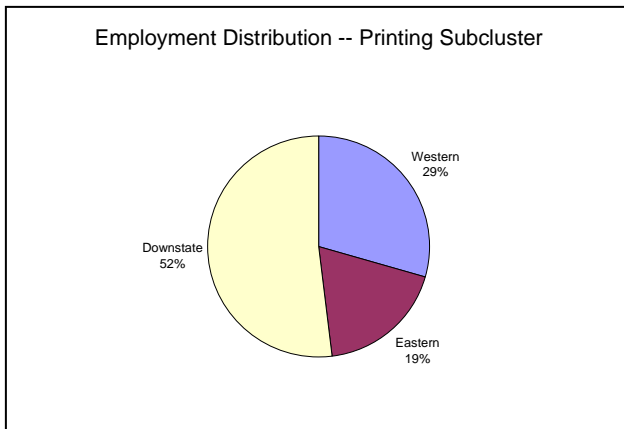
*Printing:*

The printing sub-cluster in New York State consists of printers, binders, producers of blankbooks and looseleaf binders, and prepress service firms. Two areas of the state show a significantly greater concentration of employment than the nation as a whole, the Mohawk Valley, which has a location quotient of 1.56 and the Southern Tier, which has a location quotient of 1.73.

Despite the high concentration of printing employment in these two regions, only 4,461 workers were employed by printing firms in the Mohawk Valley and Southern Tier, about 11% of the State's total printing employment. In contrast, two downstate regions, Long Island, with 6,835 printing employees and New York City, with 14,345 workers employed by printers had far more employment in this sub-cluster. Many of the largest New York City printers provide services to the financial services industry.

Some large printers located in New York are:

Bowne & Co.	New York City
Applied Graphics Technologies	New York City
Flower City Printing	Rochester
Boyd Printing	Albany
Quad Graphics	Saratoga
American Bank Note Holographics	Elmsford



Downstate includes New York City and Long Island.

Eastern includes the Mid-Hudson, the Capital Region, the North Country and the Mohawk Valley Region.

Western includes Central New York, the Finger Lakes, the Southern Tier and Western New York.

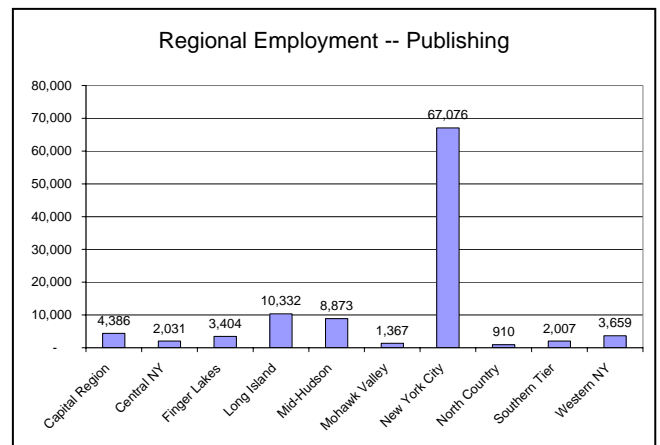
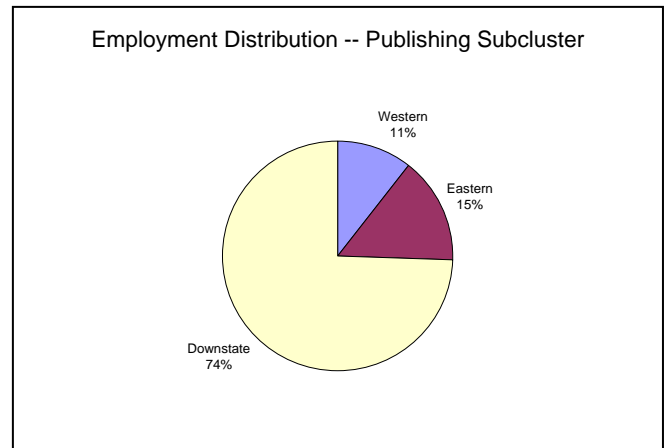
*Publishing*

Publishing employment is highly concentrated in New York State. Six regions of the state show significantly higher concentrations of employment in publishing than would be expected based on national patterns. These are the Capital region (L. Q.=1.62), Long Island (L. Q.=1.44), the Mid-Hudson region (L. Q.=1.75), the Mohawk Valley region (L. Q.=1.38), New York City (L. Q.= 3.08), and the North Country (L. Q.=1.19) With 99,421 employees, this subcluster is one of the largest components of the communications and media service cluster.

Publishing employment in New York City alone is more than 67,000. Other regions with large publishing employment include Long Island, with 10,332 employees and the Mid-Hudson region, with 8,873 employees.

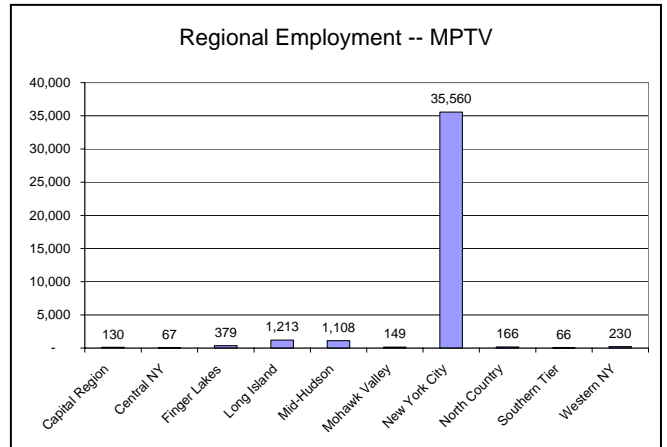
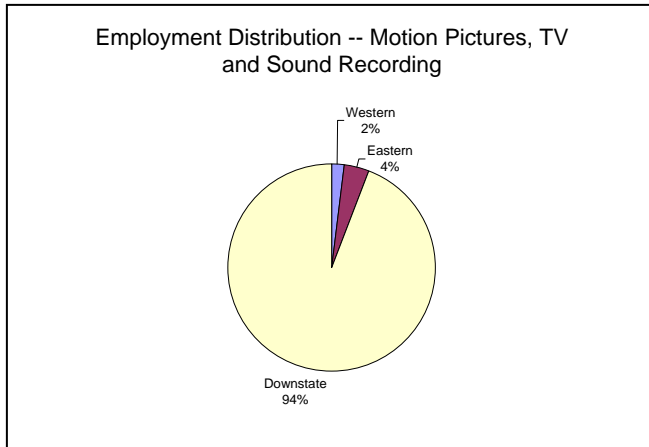
Among the major publishing firms headquartered in New York State are:

Time Warner, Inc.,	New York City
Advance Publications,	New York City
The Hearst Corporation	New York City
McGraw Hill Companies	New York City
The New York Times Co.	New York City
Scholastic Corporation	New York City
Dow Jones & Company	New York City
Random House, Inc.	New York City
Reader's Digest Assn.	Pleasantville
Primedia, Inc.	New York City
Yellow Book, USA	New York City
CMP Media, LLC	New York City



*Motion Pictures, Television and Sound Recording*

Nearly 42,000 people are employed at New York companies specializing in the production of motion pictures, television and sound recording. More than 35,500 of these employees are located at companies in New York City, which has an employment concentration that is 4.33 times that would be expected, based on national level data. No other New York regions have significant employment levels or concentrations in this sub-cluster.

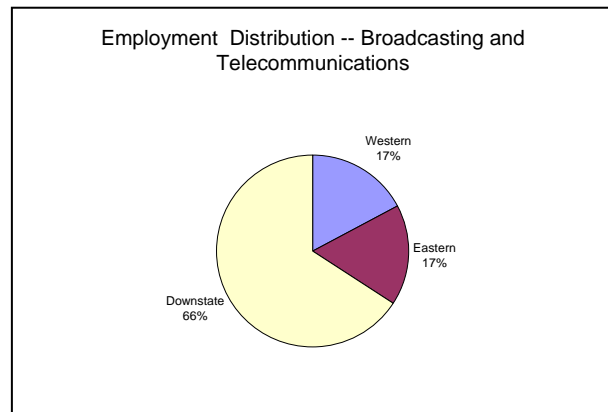


Among the large motion picture, television and sound recording companies in New York are:

- |                          |               |
|--------------------------|---------------|
| Viacom, Inc.             | New York City |
| Time Warner              | New York City |
| Sony Corporation         | New York City |
| Sony Music Entertainment | New York City |
| Fox Entertainment Group  | New York City |
| Universal Music Group    | New York City |
| Warner Music Group       | New York City |

*Broadcasting and Telecommunications*

More than 107,000 people are employed in the broadcasting and telecommunications sub-cluster in New York State. About two-thirds of the state's employment in broadcasting and telecommunications is in New York City and Long Island. New York City leads New York with 61,000 employees in the sub-cluster. Long Island has 13,600 employees, and the Mid-Hudson region has 10,200. In terms of the concentration of employment in broadcasting and telecommunications, New



York City has about 40% more workers than would be expected on the basis of national level employment patterns.

Among the larger broadcasting and telecommunications companies in New York are:

- Verizon Communications  
New York City
- Viacom, Inc.  
New York City
- Time Warner, Inc.  
New York City
- Cablevision Systems Corporation  
Bethpage
- Fox Entertainment Group  
New York City
- Bloomberg L P  
New York City
- Mediacom Communications  
New York City
- Insight Communications  
New York City
- Westwood One, Inc.  
New York City

