

## CTE Program Review – Film/Video 2013

Use labor market data, advisory board input, and institutional data to respond to the following questions:

1a. How strong is the occupational demand for the program?

The outlook for the entertainment industries is excellent as articulated by the February release of the 2013-2014 Economic Forecast & Industry Outlook from Los Angeles County Economic Development Kyser Center for Economic Research. In reference to the Southern California economy they state:

Widespread but modest improvement across industries and counties Orange County and Inland Empire (Riverside-San Bernardino) leading region in labor market gains. Private sector recovery continues despite continued local government job losses.

**Leading Sectors:** High-Tech Manufacturing and Services, Tourism, Entertainment, Professional and Business Services, Construction

**Trailing Sectors:** Financial Activities, State/Local Government Spending (p. 1)

1b. How has the demand changed in the past 5 years and what is the outlook for the next 5 years?

According the Kyser forecast, the filmed entertainment industries continue to see job growth with this upward trend nearing prerecession highs. The report summarizes as follows:

The entertainment industry and the transportation and trade industry are two of the most visible industries in Los Angeles County. The motion picture and sound recording sector accounts for most of the county's entertainment industry employment. Motion picture and sound recording jobs registered year-over-year increases throughout most of 2012, with annual employment rising 3.7 percent to nearly 130,000 jobs. If the recent trend continues, employment this year will be within range of the 2004 pre-recession high of 132,200 jobs but shy of the 1999 peak of 146,300 jobs. Whether more substantial job gains can be achieved may depend in part on the success of the California Film Tax Credit program in the coming years. Employment growth has been due to a steady rise in local production since the recession. In 2012, on-location film production rose 1.7% to 46,254 days, the third consecutive yearly gain.

(p. 32)

Domestic box office receipts for all films were up by 5.4% in 2012 to \$10.6 billion. International box office receipts, which have been more than double the domestic since 2010, likely increased by a larger margin but 2012 figures were not available at the time this report was published. As for "at-home" entertainment, spending was essentially flat

at \$18 billion last year. Revenue growth occurred through online digital distribution (electronic sell-through or EST) but rentals and purchases fell. (pp. 68-70)

Thus, the outlook for continued growth in filmed entertainment is positive. As the economy in southern California continues to rebound, job opportunities for our students should increase over the next 5 years.

1. What is the district's need for the program?

The data in Questions #1a and #1b above validate that the entertainment industries are in a growth mode and as the economy continues to recover in state wide and in particular Southern California, demand for entry-level workers trained in our discipline will increase.

2. What is the state's need for the program?

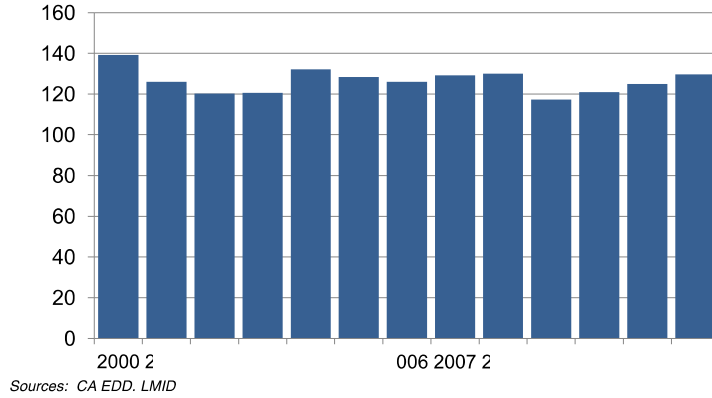
In their section *Major Industries of Southern California*, the Kyser report summarizes Motion Picture/TV Production as follows:

The Southern California entertainment industry plays a key role in the regional economy both by itself and as a tourist attraction. Motion picture and TV production is the largest part of the industry by far. The industry's spillover effects into other areas of the local economy are noteworthy. When a movie is filmed, actors, costume designers and special effects creators benefit, but so do persons working in industries as disparate as food services, security, transportation, and floral design. Los Angeles' billing as entertainment capital of the world also draws millions of tourists to the region each year.

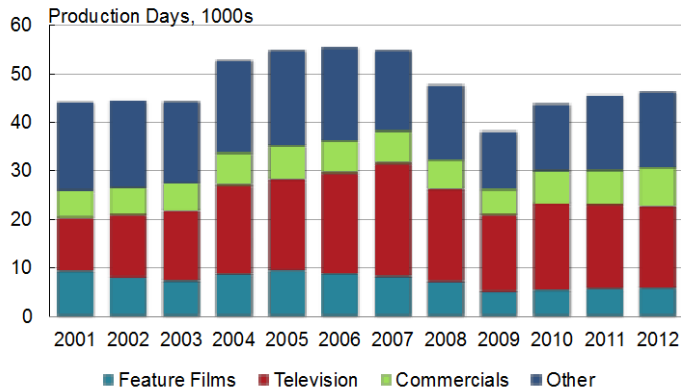
The greatest concentration of wage and salary jobs in the entertainment industry may be found in Los Angeles County. The industry added over 4,600 jobs last year, a gain of 3.7%. At 129,700 jobs, employment in the industry was at its highest level in four years. While industry employment has returned to pre-recession levels, it is still shy of the 2004 peak of 132,200 jobs. The entertainment industry also employs a large number of independent contractors. Independent contractors approached 82,400 prior to the recession, but fell in number to just over 81,000 in 2009. The number of independent contractors is estimated to exceed 85,000 as of 2012, adding substantially to the overall job count in the industry.

One measure of activity on the ground is permitted on-location production days. While it does not capture filming that takes place on sound stages, it is a reasonable proxy for industry activity. On-location film activity registered a 1.7% gain in 2012 to 46,254 production days. While on-location activity fell short of pre-recession peak levels of roughly 55,000 days that prevailed from commercials jumped by 14.1%. However, television experienced a decline of 3.4%, following a 2.5% decrease a year earlier.

## Motion Picture & Sound Recording Employment in Los Angeles County



## On-Location Film Production Days by Type



*Saxe Pinta*

Thus, the positive outlook for Motion Picture/TV Production suggests the need for the program as it will provide an educated workforce for the one of the largest industries in southern California.

3. How does the program address needs that are not met by other similar programs in the area?

South Bay students would need to travel north to Santa Monica College, south to Long Beach City College or east to Cerritos College to find similar programs in Film/Video Production or Film Studies. The commute and high transportation costs would make these less than desirable programs to attend for our students. Furthermore, CSU Dominguez Hills does not offer a bachelor degree in film. Thus ECC's Film/Video Department is the only program in the South Bay area to offer film education and production training.

4. Are the students satisfied with their preparation for employment? Are the employers in the field satisfied with the level of preparation of our graduates?

Data not available through Institutional Research.

5. What are the completion success and employment rates for the students?

Completion of the program is above average when compared with Division and College rates; employment rates are unavailable. The program also has above average transfer rates to nearby 4-year schools, in particular CSU Long Beach and CSU Northridge, where students gain further training in production in preparation for entering the job market.

6. What impact does the advisory board have on the program?

The Advisory Committee is crucial as the members are working professionals and our program's direct link to the entertainment industries, particularly in Film and TV Production. As filmed entertainment is distancing itself from its film (the originating medium) roots and the move to digital production technologies has accelerated, the Committee provides critical feedback on technological shifts, production practices, and other changes happening in industry. Without their guidance and feedback, it would be nearly impossible to stay current with industry trends. Professor O'Brien, the lead Film/Video faculty member, communicates with the Advisory Committee on a regular basis and the Committee meets annually either in person or through online meetings.

The current Advisory Committee is comprised of these professionals:

Mr. Adrian DeLude, Dailies Features Colorist, Company 3

Jay So, Independent Producer, Member PGA

Michael Alberts, 1<sup>st</sup> Assistant Director, Member DGA

Raffi Bagdasarian, Senior Producer, Sony Mobile Content Division

Gary Uchino, Clairmont Camera Rental Division (former ECC student)

Professor Tom Blomquist, CSULB Dept. of Film & Electronic Arts, Member DGA, WGA

Gerson Sanginitto, Director/Producer, Sophia Films (former ECC student)

Carina Sanginitto, Cinematographer, Sophia Films (former ECC student)

Note: DGA is the Directors Guild of America, PGA is the Producers Guild of America, and the WGA is the Writers Guild of America.