

DIGITAL MEDIA & ENTERTAINMENT REGIONAL PROGRAM ADVISORY MEETING

APRIL 11, 2023
11:00 AM – 1:00 PM

POWERED BY



California
Community
Colleges



LOS ANGELES COUNTY
ECONOMIC DEVELOPMENT CORPORATION

Collectively Advancing Opportunity and Prosperity for All



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CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH



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LOS ANGELES
REGIONAL
CONSORTIUM

DIGITAL MEDIA & ENTERTAINMENT REGIONAL PROGRAM ADVISORY

Jermaine Hampton

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The LA -19 is leading industry -education partnerships to collaboratively strengthen our region's talent development ecosystem

1. Data-driven research on the supply and demand for talent
2. Industry Councils and Regional Program Advisories
3. Developing work-based learning and employment opportunities

For more information, visit: www.CompetitiveWorkforce.LA

Dr. Narineh Makijan
Chair/Assistant Vice President
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Nancy Robinson

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Kathy Bañuelos
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Creative & Production Impact

Warner Bros. Discovery

Marco Flores

VP of News & West Coast Regional Lead
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Univision Communications Inc.

Diego Saavedra
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For Entertainment &
Digital Media,
industrial
employment is
measured using 25
NAICS codes

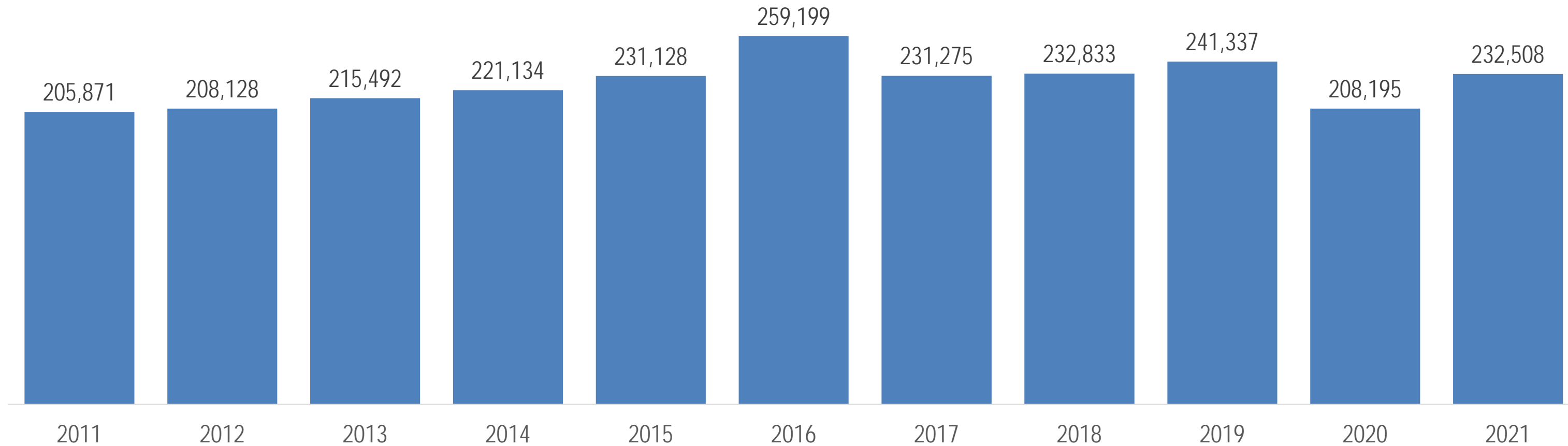
- Motion Picture and Video
- Sound Recording
- Television Broadcasting
- Radio Broadcasting
- Cable and Other Subscription Programming
- Performing Arts Companies
- Spectator Sports
- Promoters of Performing Arts, Sports, etc.
- Agents and Managers for Public Figures
- Independent Artists, Writers, and Performers
- Advertising Agencies
- Media Buying Agencies
- Media Representatives
- Outdoor Display Advertising Services
- Graphic Design Services
- Marketing Research/Public Opinion Polling
- Commercial Photography
- Custom Computer Programming Services
- Wired Telecommunications Carriers
- Data Processing, Hosting, and Related Services
- News Syndicates
- Internet Broadcasting, Publishing, Web Portals
- Newspaper Publishers
- Periodical Publishers
- Software Publishers

We further
condensed these
NAICS codes into 7
general groupings

- Motion Picture and Sound Recording Industries
- Broadcasting (no internet)
- Performing Arts, Spectator Sports, and Related Industries
- Advertising, Public Relations, and Related Services*
- Other Professional and Technical Services in Digital Media*
- Distribution*
- Publishing (no internet)*

*Only industries relevant to Digital Media

Entertainment and Digital Media Employment
Los Angeles County, 2011 - 2021

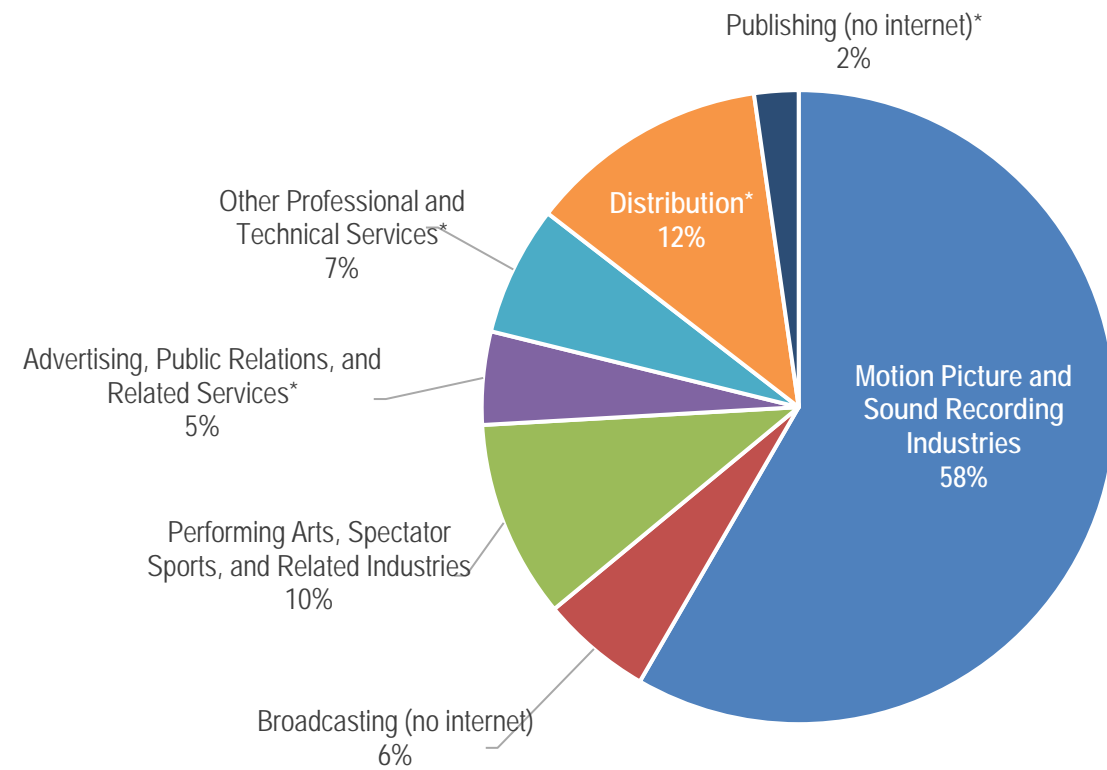


Source: CA EDD

Entertainment and Digital Media employment has seen a steady upward trend for the last 10 years, never dipping below the 2011 mark of near 206,000 employees.

Change in Entertainment and Digital Media Employment Los Angeles County, 2011 - 2021

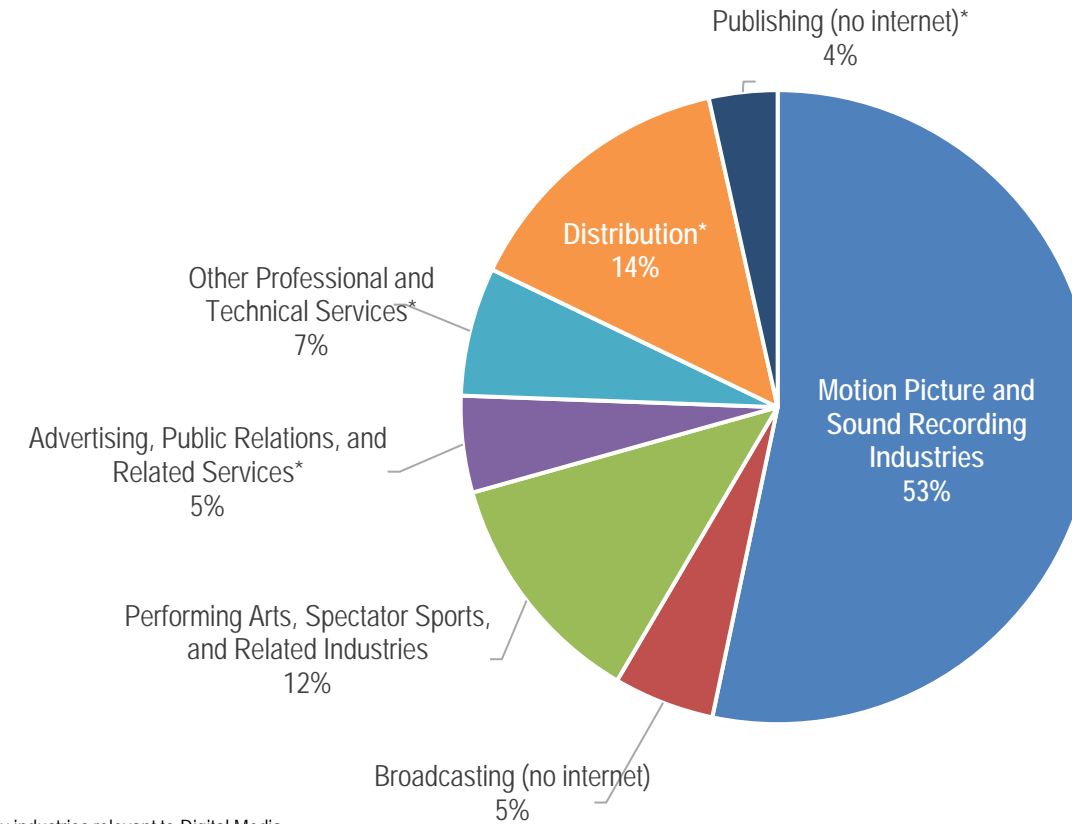
Los Angeles County 2011



*Only industries relevant to Digital Media

Source: CA EDD

Los Angeles County 2021



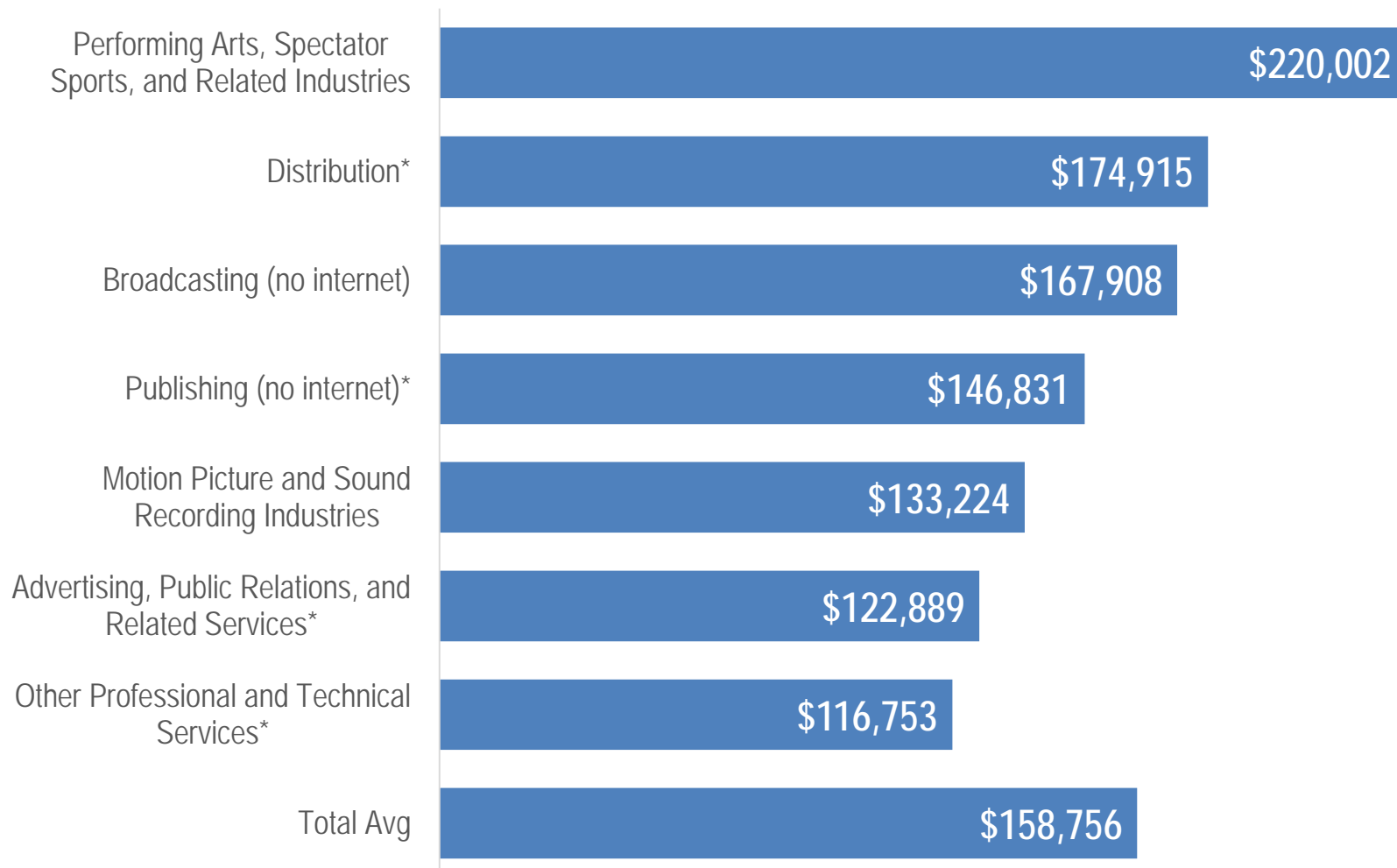
*Only industries relevant to Digital Media

Source: CA EDD

Since 2011 Motion Picture and Sound Recording remains the largest industry, holding over 50 percent of employees through 2021. The remaining industry groupings have remained stable or experienced small growths between 1 and 2 percent.

Average Annual Pay in Entertainment and Digital Media Industries

Los Angeles County 2021



*Only industries relevant to Digital Media

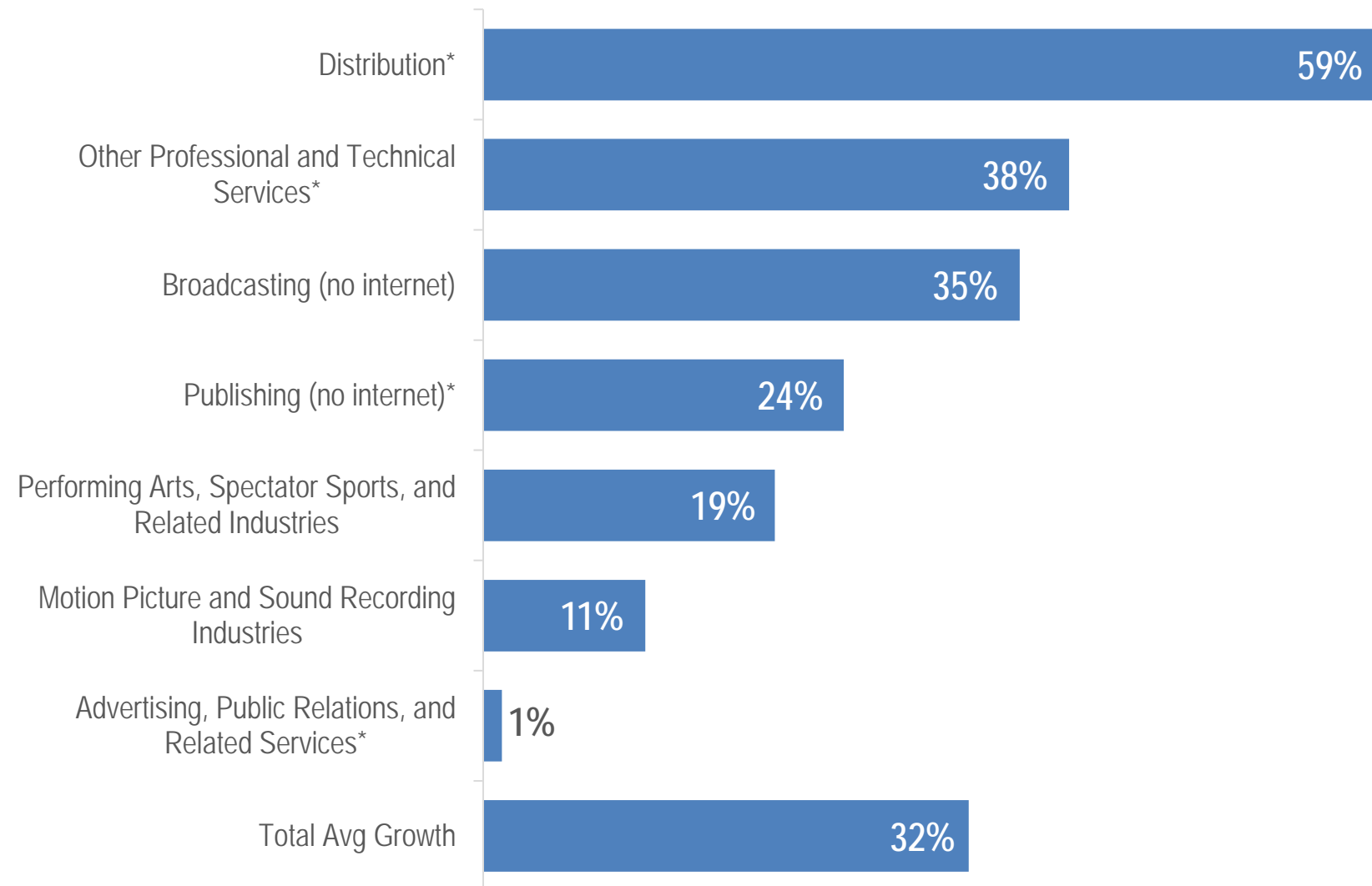
Source: CA EDD

Each industry grouping pays a living wage in Los Angeles county, with none paying less than \$116,000 per year.

In May 2021, the average salary in Los Angeles county was about \$66,000 per year.

Real Wage Growth in Entertainment and Digital Media Industries

Los Angeles County 2011 - 2021



Over the last 10 years, real wages grew at varying rates across the industry groupings.

The largest increase occurred in digital media Distribution industries, with 59 percent growth since 2011.

Overall, real wages in the Entertainment and Digital Media industries grew 32 percent.

*Only industries relevant to Digital Media

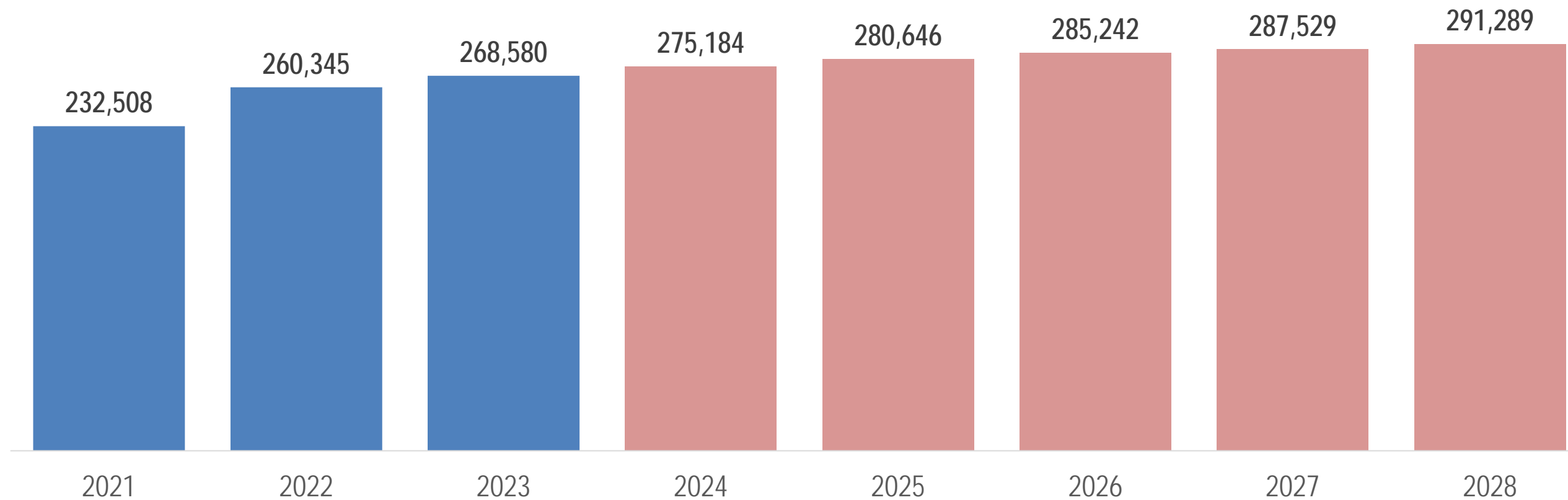
Source: CA EDD

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Looking Forward

From 2021 to 2028, employment is expected to grow 25% percent, forecasting over 7,000 new jobs per year in Entertainment and Digital Media industries.

Forecasted Entertainment and Digital Media Employment
Los Angeles County, 2021 - 2028



Source: Lightcast

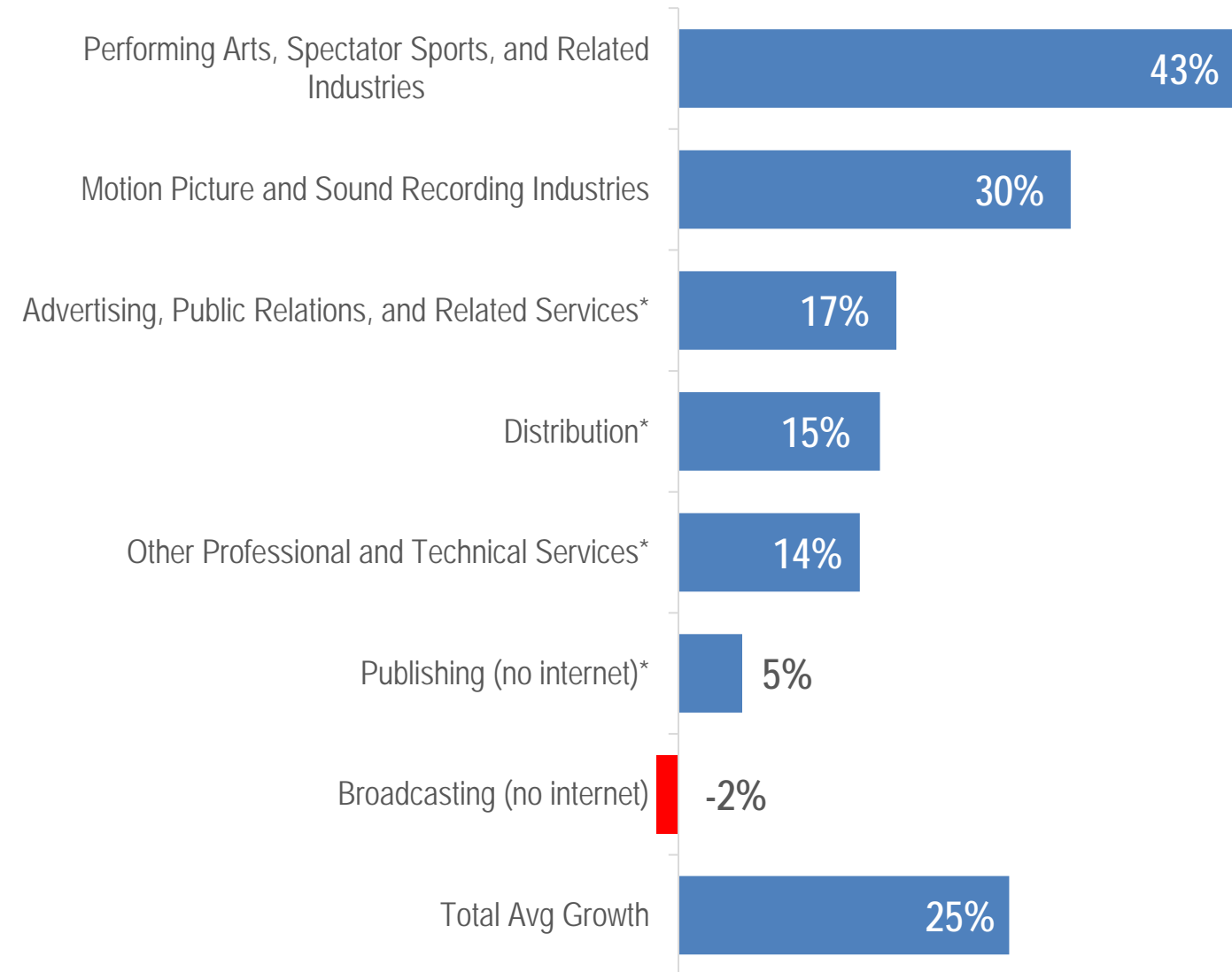
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Entertainment and Digital Media is anticipated to grow the most in Performing Arts, Spectator Sports, and related industries (43 percent), and Motion Picture and Sound Recording industries (30 percent).

Industries anticipated to grow the least are those operating mostly outside digital mediums.

Looking Forward

Forecasted Employment Growth in Entertainment and Digital Media Industries Los Angeles County, 2021 - 2028



*Only industries relevant to Digital Media

Source: Lightcast

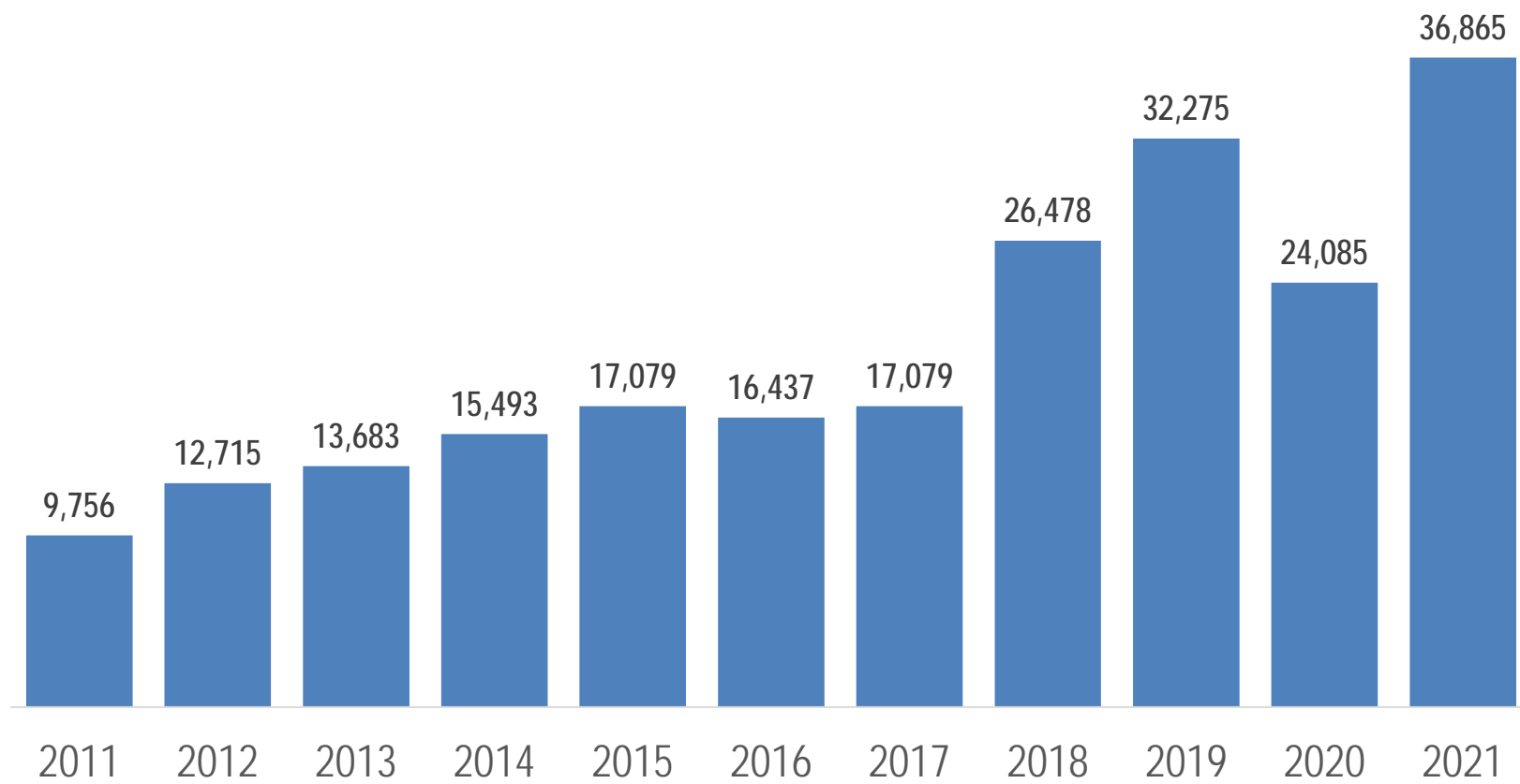


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Employer Job Postings

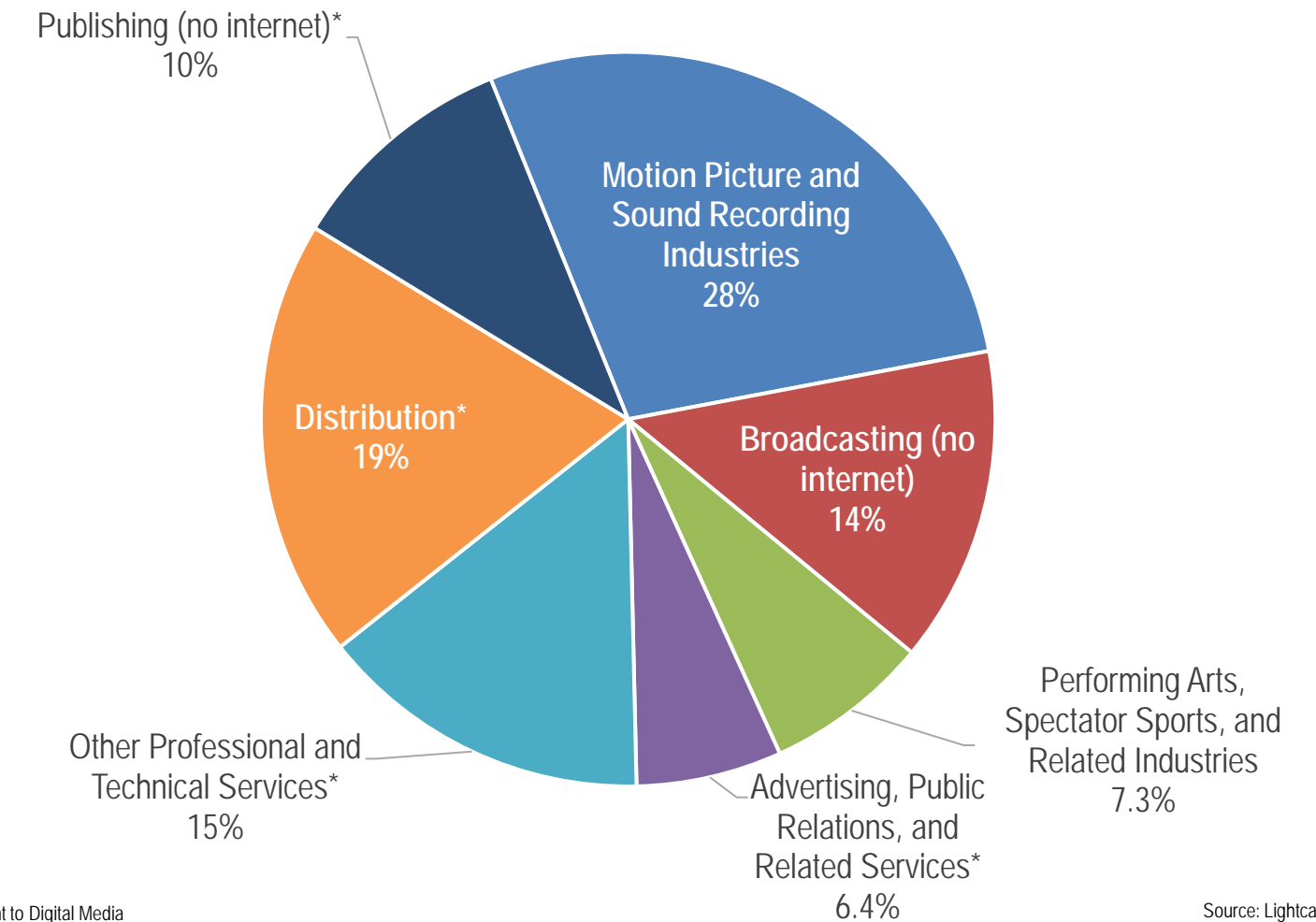
Job postings peaked in 2021, with nearly 37,000 job postings compared to about 10,000 in 2011. Motion Picture and Sound Recording industries represent the largest industry grouping over this 10-year period, with 28 percent of total posts.

Total Entertainment and Digital Media Job Postings
Los Angeles County, 2011 - 2021



Source: Lightcast

Distribution of Entertainment and Digital Media Job Postings
Los Angeles County, 2011 - 2021



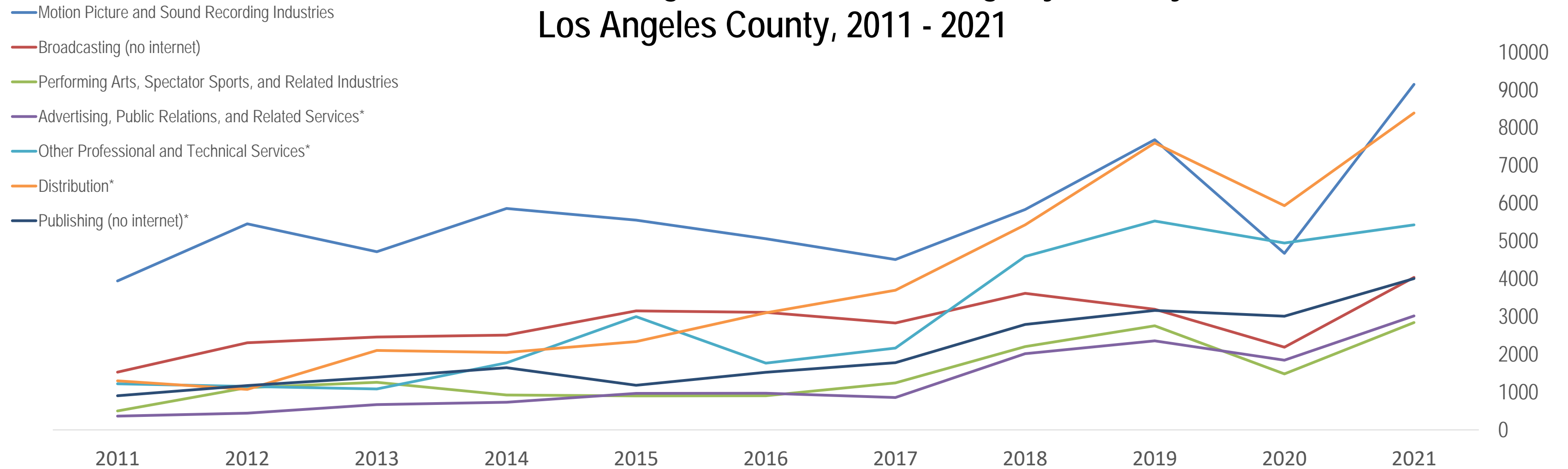
*Only industries relevant to Digital Media

Source: Lightcast



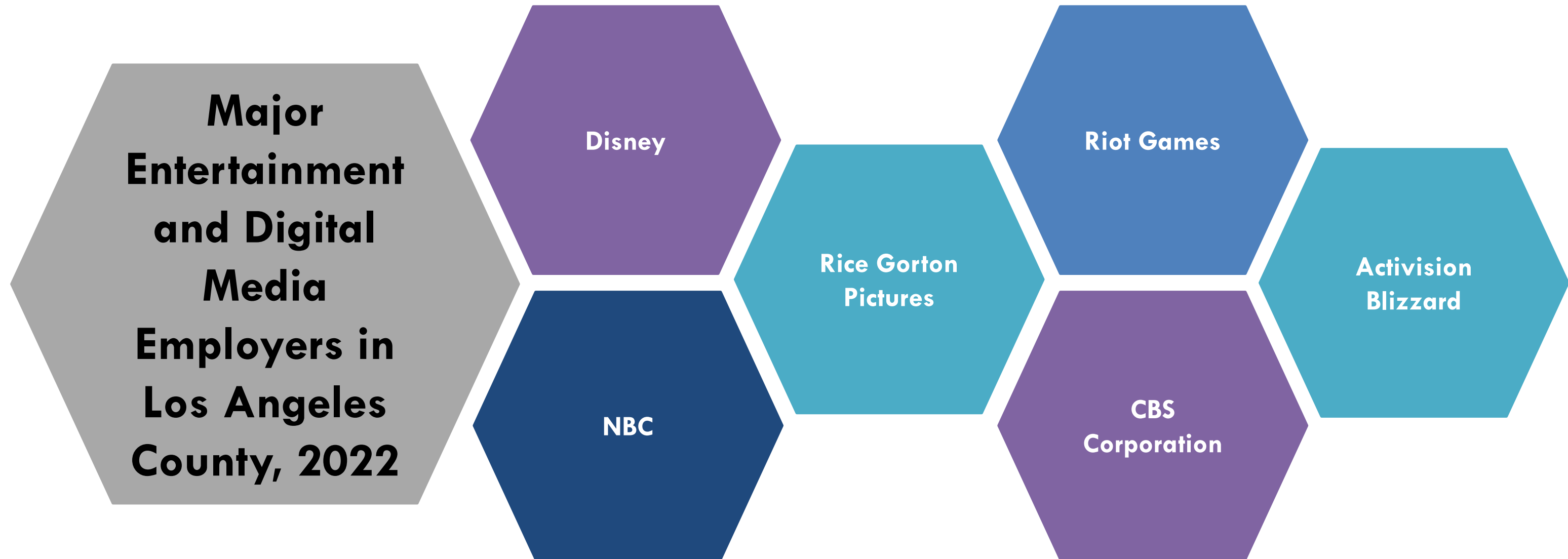
Over the last 5 years, Distribution industries and Professional and Technical Service industries related to digital media began posting for more positions at higher rates than other industries.

Entertainment and Digital Media Job Postings by Industry Los Angeles County, 2011 - 2021

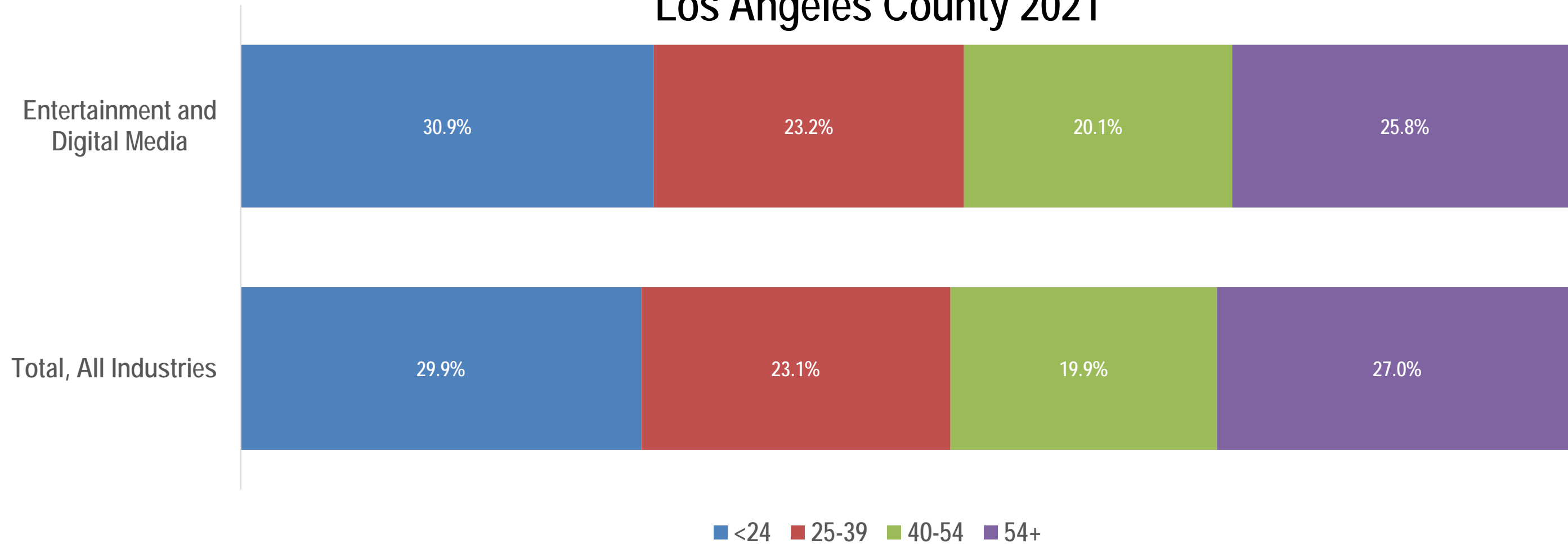


*Only industries relevant to Digital Media

Source: Lightcast

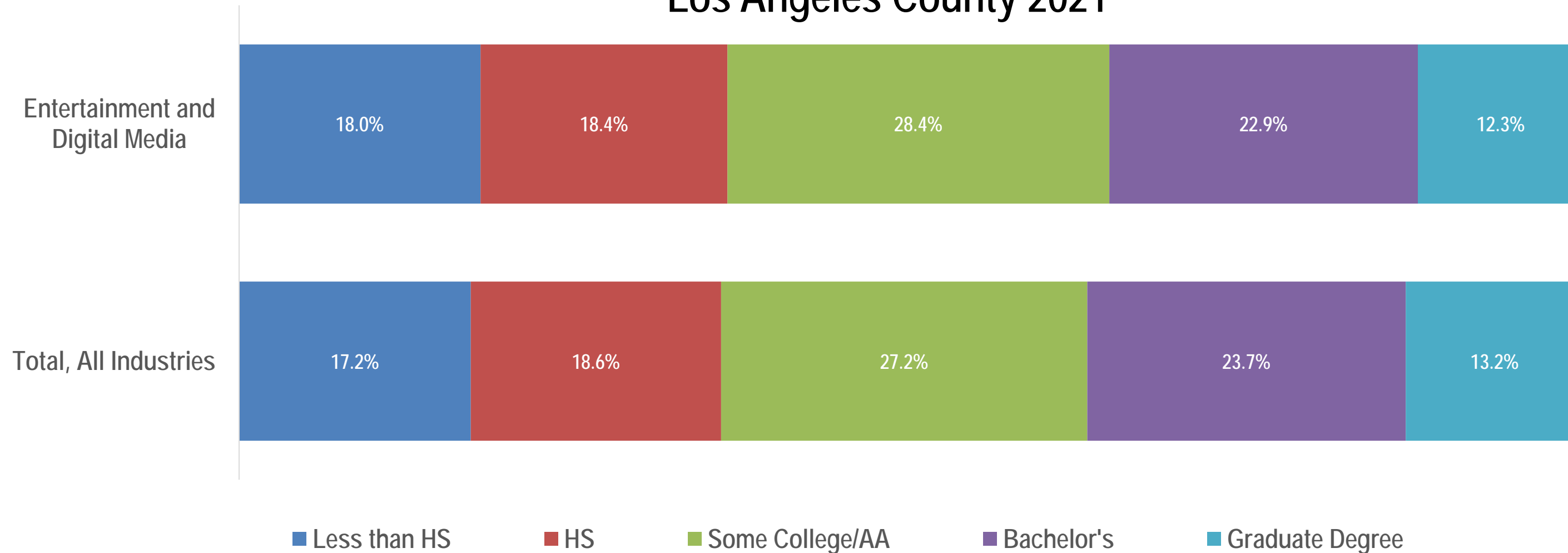


Age Distribution of Entertainment and Digital Media Workers
Los Angeles County 2021



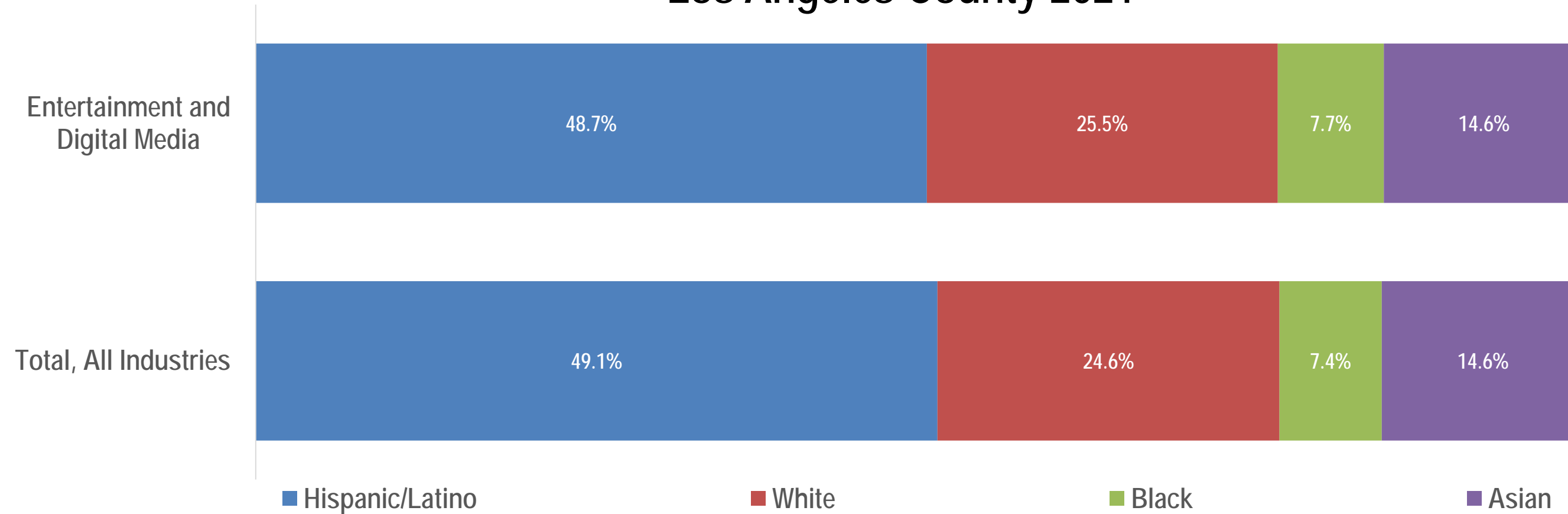
Entertainment and Digital Media industries are marginally younger than most other industries in Los Angeles county, with about 1.3 percent more workers younger than 54.

Educational Attainment Distribution of Entertainment and Digital Media Workers Los Angeles County 2021



Entertainment and Digital Media jobs are slightly more attainable than those in most other industries in Los Angeles county with 64.8 percent of workers having some college, an Associate's degree or less, about 2 percent more than other industries in the county.

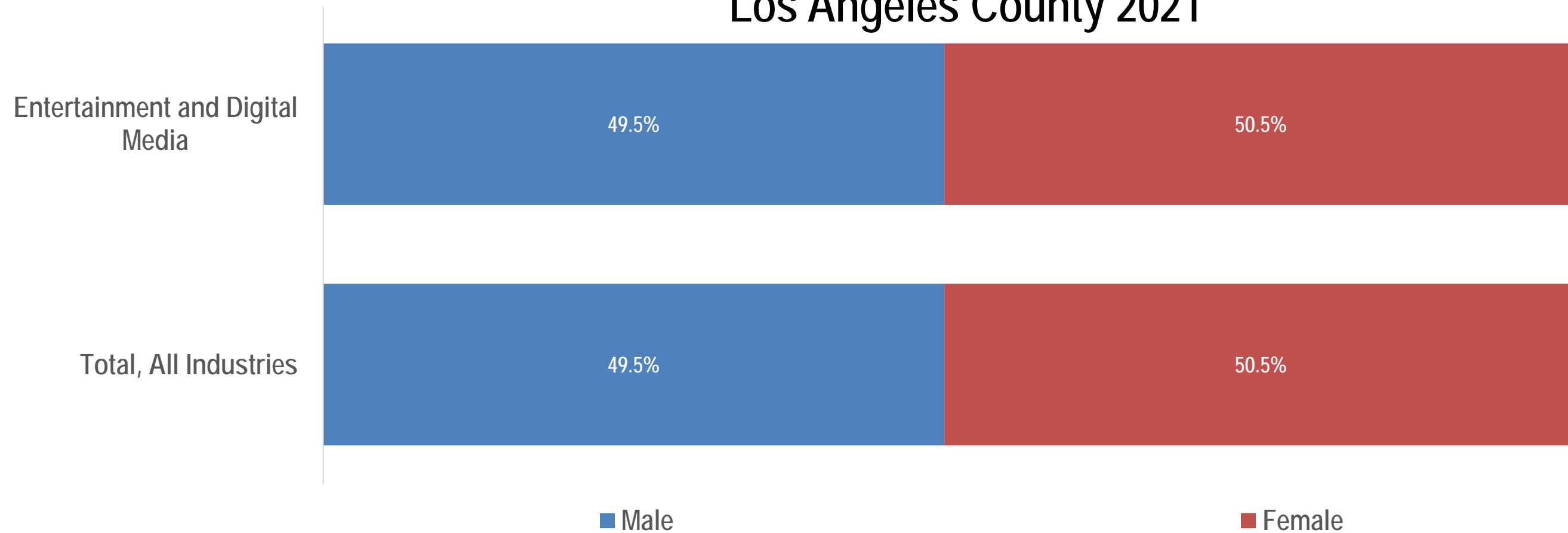
Racial/Ethnic Distribution of Entertainment and Digital Media Workers
Los Angeles County 2021



Source: PUMS

Entertainment and Digital Media industries share a similar racial/ethnic distribution to most other industries in Los Angeles county, with about 1 percent more persons of color employed.

Gender Distribution of Entertainment and Digital Media Workers
Los Angeles County 2021



Source: PUMS

Entertainment and Digital Media industries have near perfect gender parity, with an identical distribution to most other industries in Los Angeles county.

Metric		Graphic Designers	Television, Video, and Film Camera Operators and Editors	Photographers
Sex	Male	54%	77%	65%
	Female	46%	23%	35%
Education	Less than HS	1%	1%	2%
	High School	4%	6%	10%
	Some College/Associates	28%	25%	33%
	Bachelor's	58%	54%	45%
	Graduate School	9%	13%	11%
Age	<25	6%	9%	9%
	25-39	52%	47%	46%
	40-54	29%	31%	27%
	>54	13%	14%	18%
Race	Hispanic	22%	16%	22%
	White	44%	68%	59%
	Asian	25%	8%	11%
	Black	5%	5%	4%

Source: PUMS

Female workers, Hispanic workers, and Black workers are underrepresented in the selected occupations. These occupations are accessible to those with some college experience or higher, with younger people also able to find employment.

- Real wages have grown 32% since 2011
- All industries pay a living wage in Los Angeles county, with the lowest annual pay still being \$16,000 more than the average annual salary in the county.
- Employment is expected to grow 25% on average across all Entertainment and Digital Media industries through 2028
- Industries with stronger digital ties are growing more than those operating outside digital spaces.

CONTACT INFORMATION

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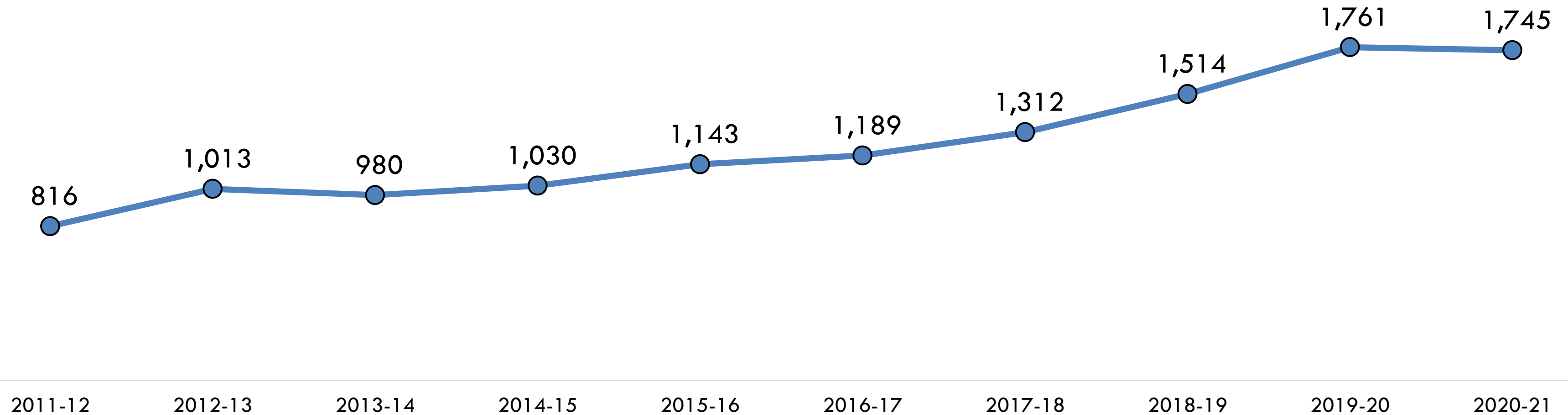
hosted at Mt. San Antonio College

16 community colleges offer digital media and entertainment programs in three in-demand areas:

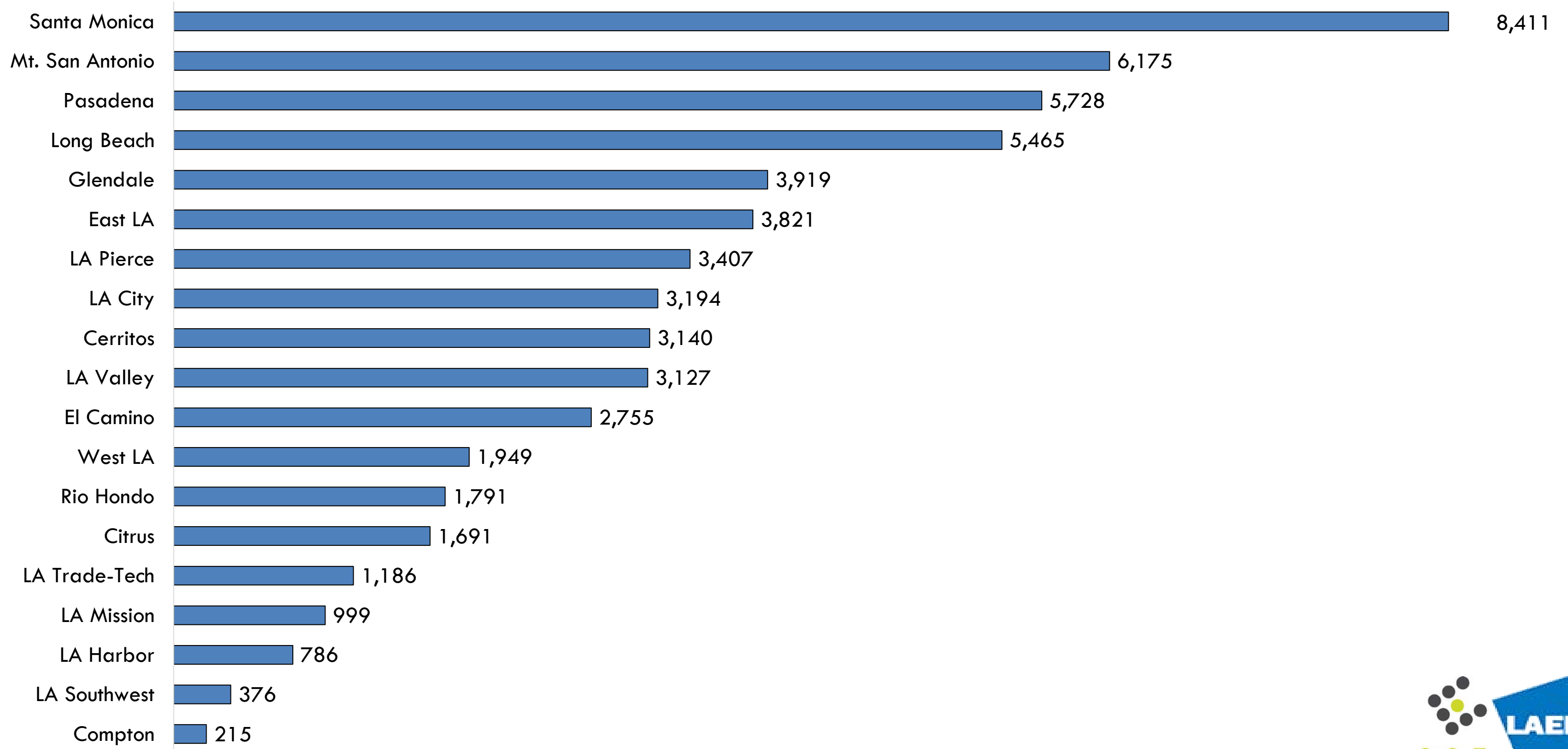
- **Production Equipment Technicians**
 - Technology & equipment using TV, film, video & photography
- **Digital Art and Design**
 - Combines electronic technology with fine arts & communication
- **Set Design and Makeup/Costume**
 - Communicate moods and ideas through set design, makeup & costuming

The number of completions for Information & Communication Technologies-Digital Media (ICT-DM) students at LA community colleges has steadily increased since 2013-14, growing to 1,745 student completions in the 2020-21 academic year.

**LA ICT-DM Students who Earned a Degree or Certificate
2011-12 to 2020-21**



LA ICT-DM Student Enrollments by College, 2020-21



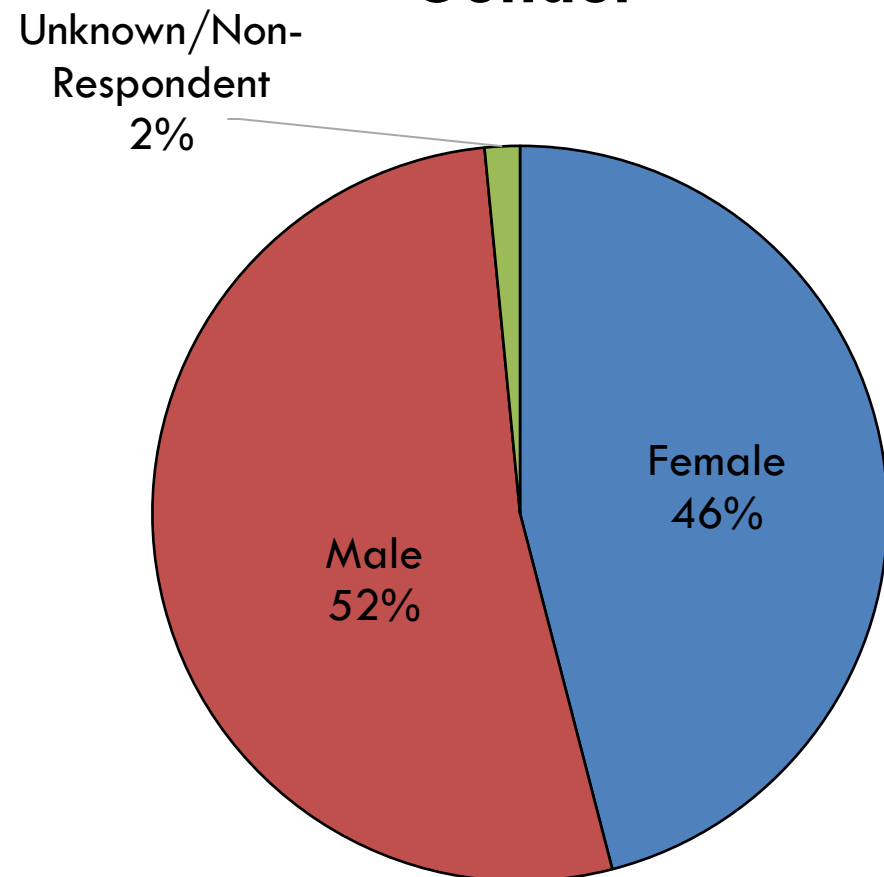
Source: California Community Colleges Chancellor's Office LaunchBoard



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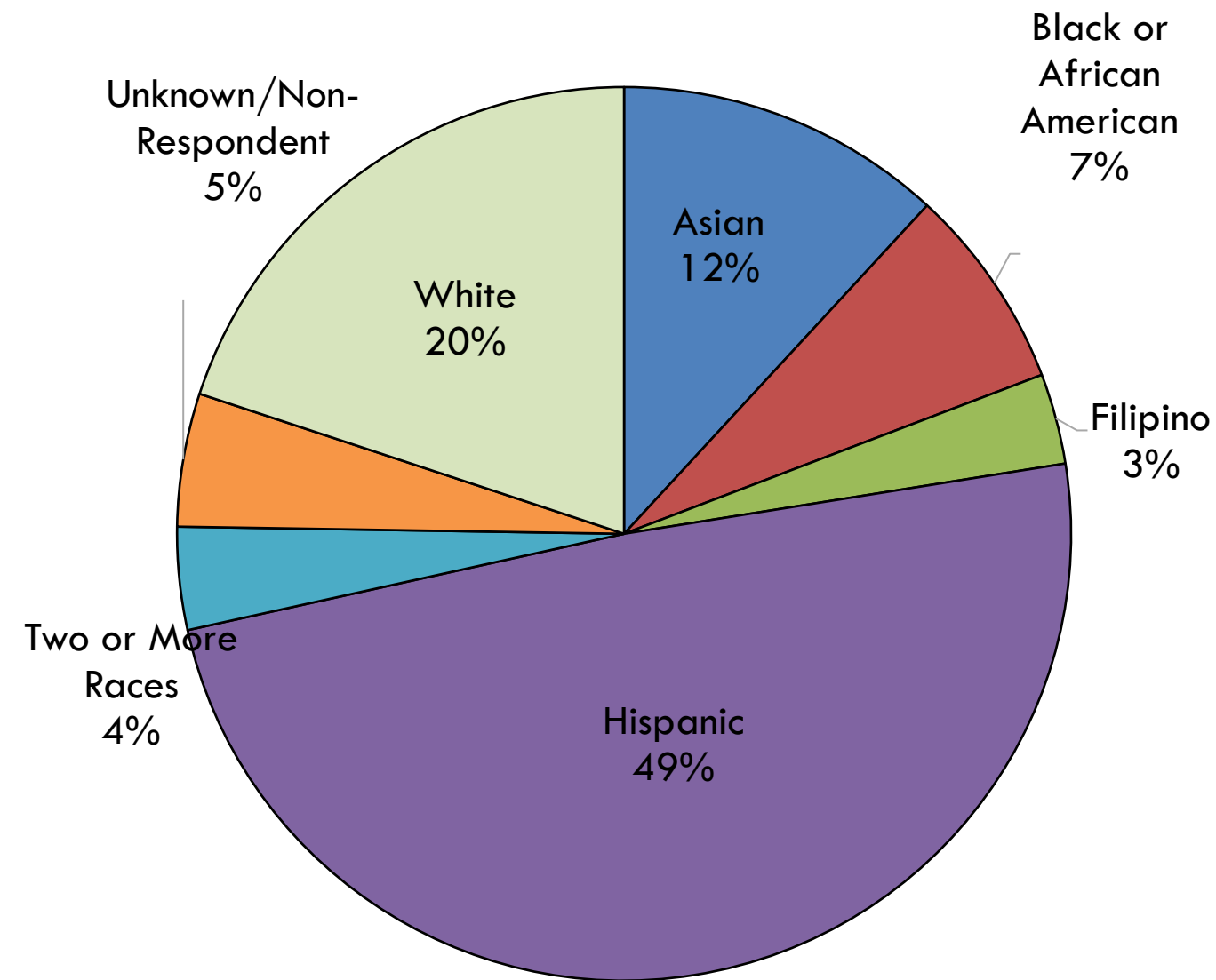
ICT-DM Student Demographics

Gender

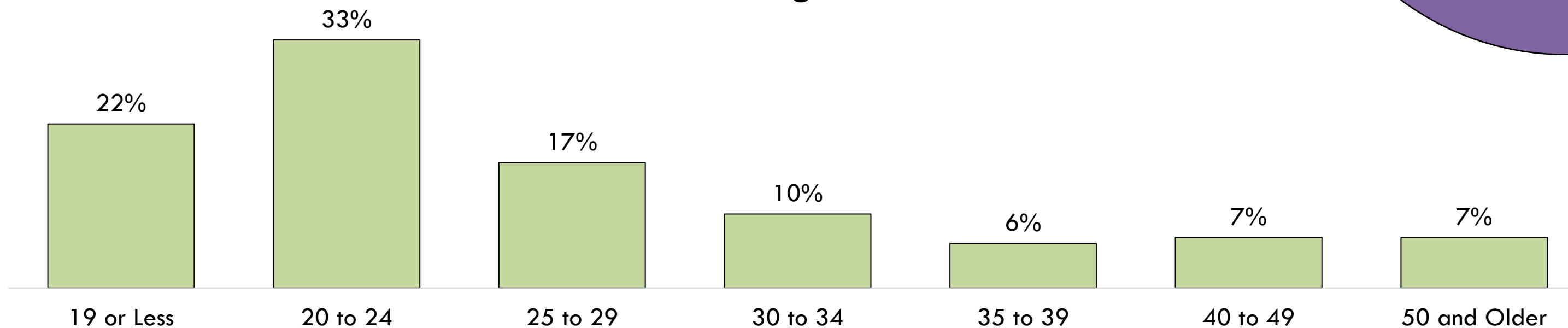


Just over half of ICT-DM students at the LA community colleges are male, nearly half identify as Hispanic, and more than half are 24-years-old or younger.

Race/Ethnicity



Age

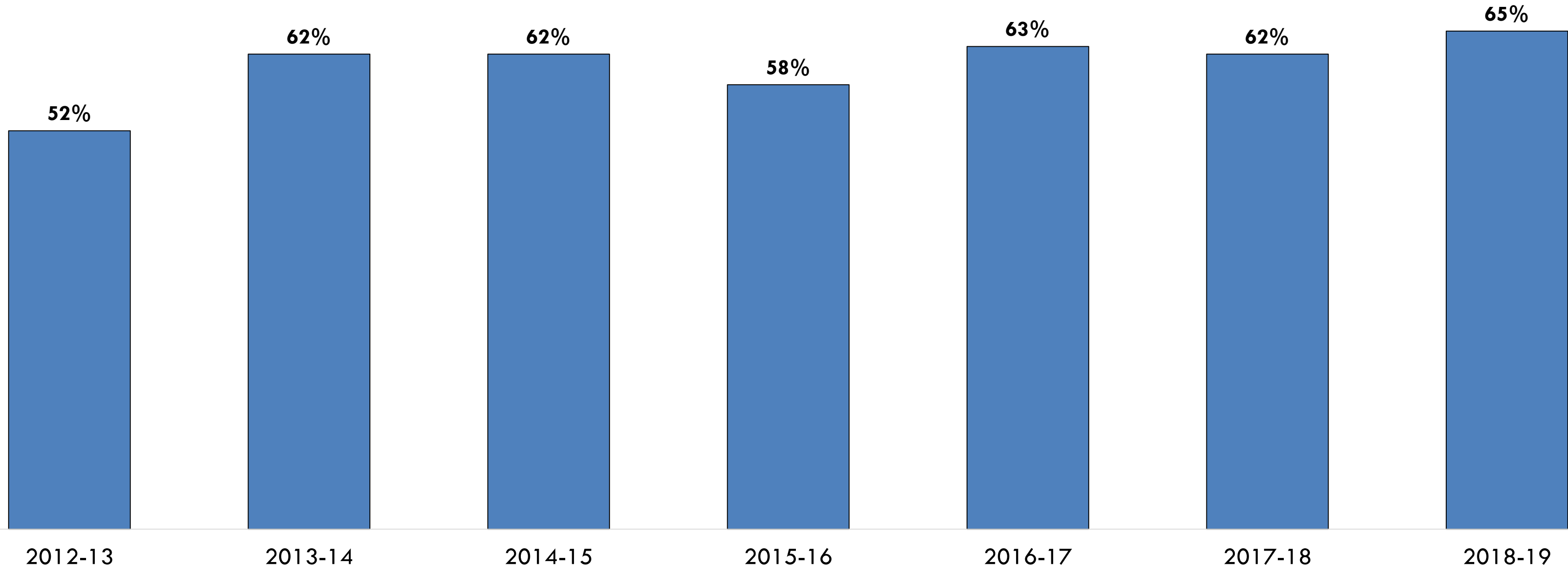


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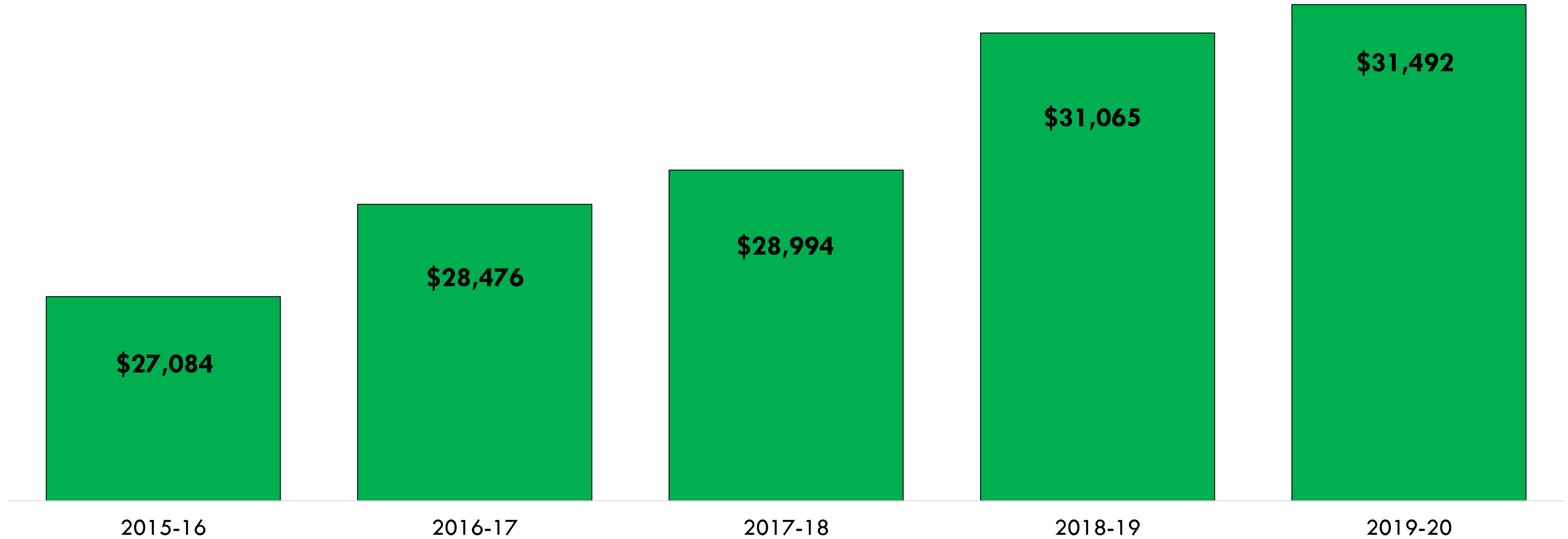
DME Programs At-a-Glance

TOP6 - Program Title	2019-20	2020-21	2021-22	Latest 3 Yr Avg
0604.20 – Television (including combined TV/Film/Video)	261	306	334	300
0612.20 – Film Production	167	160	247	191
0614.40 – Animation	134	155	198	162
1303.10 – Fashion Design	152	102	103	119
1012.00 – Applied Photography	134	65	102	100
1006.00 – Technical Theater	59	31	64	51
0604.20 – Radio and Television	48	30	24	34
0614.00 – Digital Media	18	27	52	32
0614.10 – Multimedia	26	32	32	30
1303.00 – Fashion	23	24	33	27
0614.60 – Computer Graphics and Digital Imagery	13	29	9	17
1303.30 – Fashion Production	3	1	4	3
Total	1,038	962	1,202	1,067

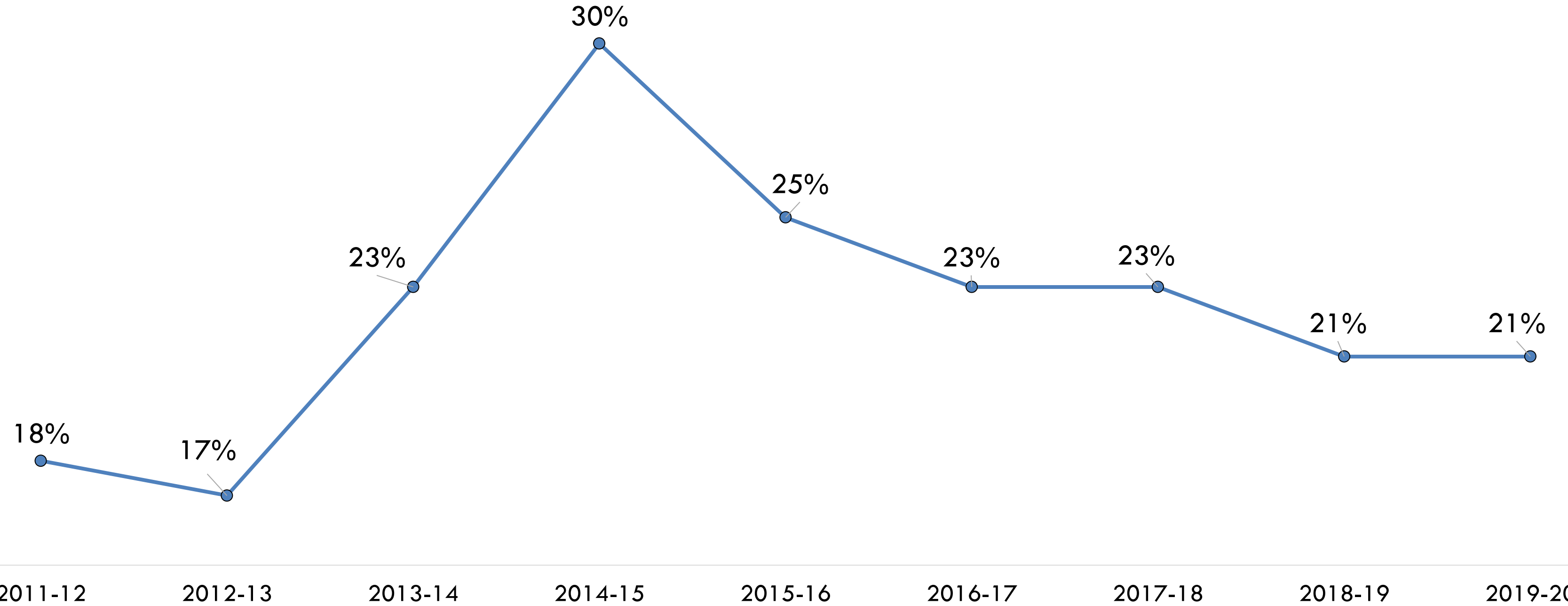
LA ICT-DM Students with a Job Closely Related to Their Field of Study



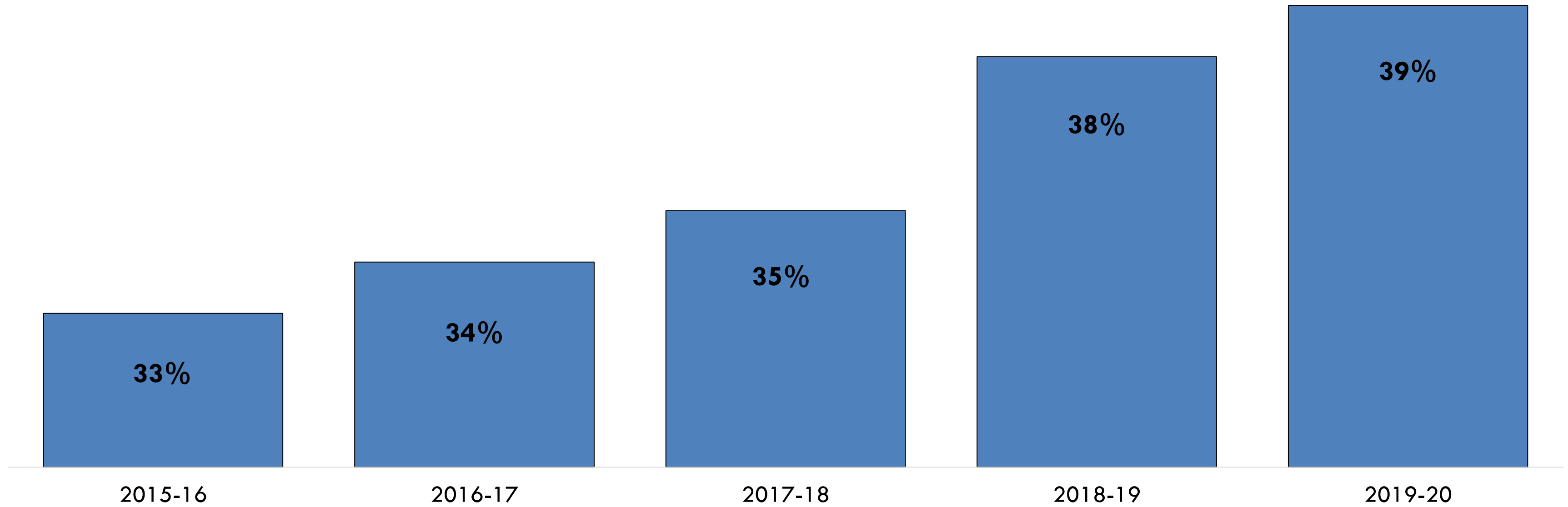
Median Annual Earnings for Exiting LA ICT-DM Students



Median Change in Earnings for Exiting LA ICT-DM Students



Exiting ICT-DM Students Who Attained the Living Wage

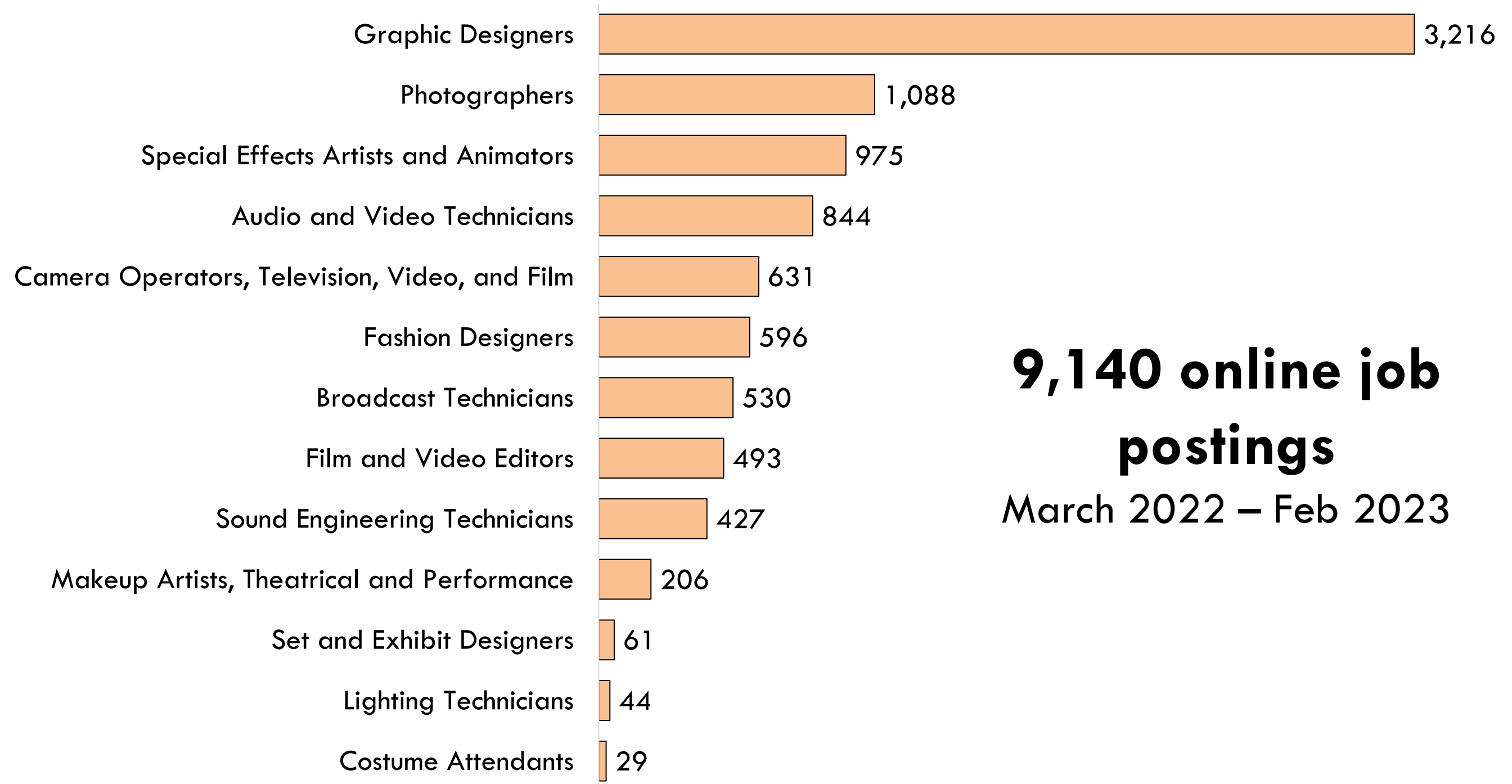


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Target DME Occupations

Occupation	2021 Jobs	2026 Jobs	2021 - 2026 % Change	Avg. Annual Openings	Entry-Level Hourly Earnings (25th Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75th Percentile)
Graphic Designers	21,158	22,393	6%	2,217	\$18.30	\$27.79	\$40.32
Film and Video Editors	13,244	15,979	21%	1,989	\$21.53	\$30.29	\$50.36
Photographers	11,003	12,655	15%	1,374	\$14.77	\$24.82	\$43.08
Special Effects Artists and Animators	7,148	8,329	17%	1,059	\$20.30	\$34.14	\$47.50
Audio and Video Technicians	6,279	7,684	22%	961	\$21.31	\$28.48	\$40.93
Camera Operators, TV, Video & Film	6,129	7,240	18%	887	\$20.91	\$23.99	\$39.22
Sound Engineering Technicians	4,507	5,209	16%	607	\$26.86	\$30.85	\$45.27
Fashion Designers	4,318	4,380	1%	472	\$26.19	\$35.91	\$48.35
Set and Exhibit Designers	3,346	3,397	2%	363	\$13.09	\$24.38	\$38.62
Broadcast Technicians	3,222	3,348	4%	343	\$14.66	\$14.75	\$30.99
Makeup Artists, Theatrical & Perform.	1,084	1,208	11%	195	\$45.85	\$78.89	\$80.86
Lighting Technicians	862	1,015	18%	121	\$19.16	\$28.01	\$32.00
Costume Attendants	753	865	15%	244	\$18.33	\$33.24	\$38.10
Total	83,053	93,703	13%	10,831	-	-	-

Number of Job Postings by Occupation



**9,140 online job
postings**
March 2022 – Feb 2023

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Employer Job Postings

Job Title	Job Ads	Employer	Job Ads
Graphic Designers	1,329	Disney	164
Video Editors	383	NBC	120
Audiovisual Technicians	334	Encore Global	77
Photographers	308	24 Seven*	55
Videographers	218	Robert Half*	53
Visual Designers	148	Electronic Arts	52
Fashion Designers	140	CBS Corporation	45
Motion Graphics Designers	125	Onward Search*	45
Makeup Artists	121	Aquent*	43
VFX Artists	99	Creative Circle*	42
Animators	81	Live Nation	38

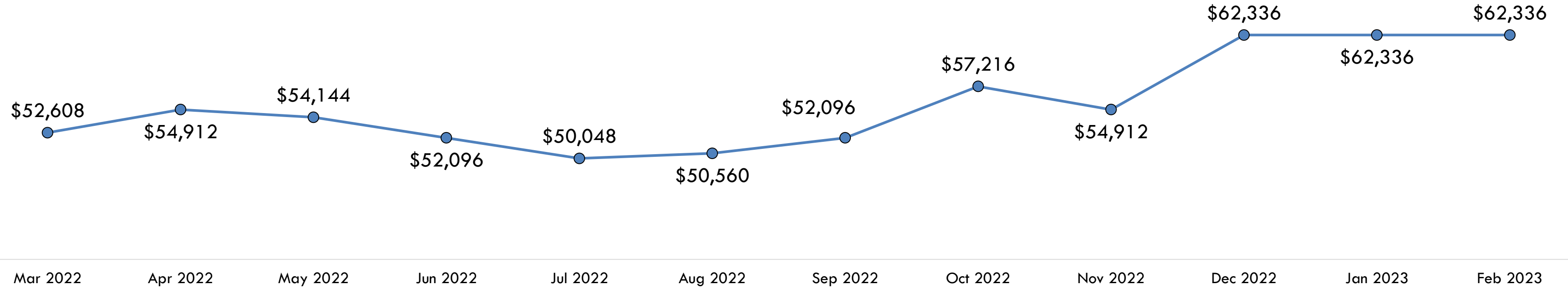
*Staffing/Employment agency



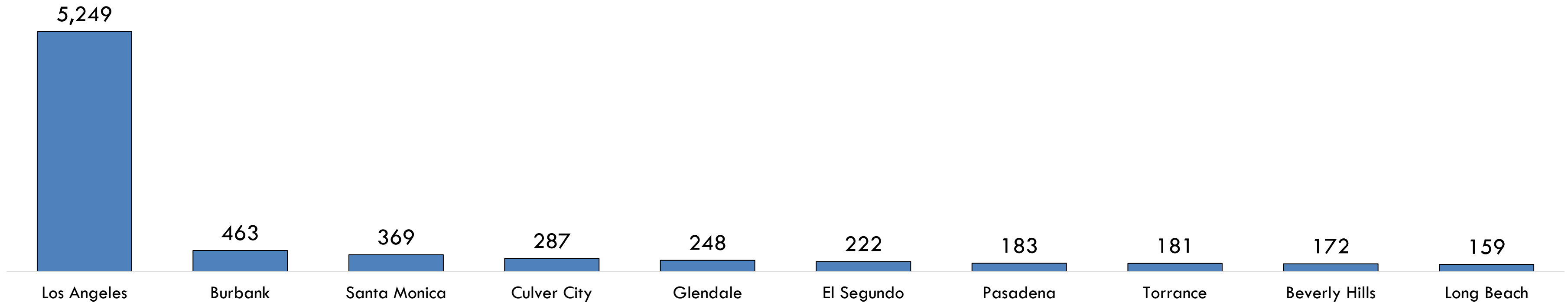
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Employer Job Postings

Advertised Wage Trend Over Last 12 Months



Top Job Postings by City



Source: Lightcast Job Postings, datarun 2023.1



CONTACT INFORMATION

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ROUNDTABLE DISCUSSION

- Mute yourself throughout discussion
- Submit questions through the chat box
- 15-20 minutes of discussion per topic
- Discussion will be followed by Q&A

FEEDBACK POLL AND NEXT STEPS

THANK YOU!

WWW.COMPETITIVWORKFORCE.LA

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