Labor Market Forces Shaping the Film Industry in South Carolina:
Research Report Summary

Dr. Uma Gupta, Director, Business Analytics
ugupta@uscupstate.edu
Dr. Colby King, Associate Professor of Sociology
kingcr@uscupstate.edu
University of South Carolina Upstate

State of South Carolina's Film Industry

- In their 2021 report, the Motion Picture Association (MPA) reported that the film and TV combined direct and indirect employment in the film and TV industry in South Carolina was approximately 7,000 jobs.
- The SC Department of Employment and Workforce Quarterly Census of Employment and Wages (QCEW) from the second quarter of 2023 reported there were 253 employers and 1,597 workers in this sector, with an average salary of $659 per week associated with the Motion Picture and Video Industry (SC DEW, 2024).
- The 2022 American Community Survey (ACS) counted 3,480 people employed in film occupations, with 427 of those working in the Upstate. By industry category, the 2022 ACS reported 2,672 people employed in film, with 522 of those in the Upstate region.
- Since each of these data points are point-in-time snapshot surveys of a dynamic industry, we encourage observers to focus on data trends over time, rather than specific data points.

Education and Technological Change

In the Upstate, the ACS reports that more than one-third (36.5%) of those employed in the film industry have pursued some education beyond high school diploma or GED but have not earned an associate or bachelor's degree. This is much higher than the 20.4% of workers with an unfinished degree in all other industries. Statewide the difference is smaller, but in the same direction: 25.1% in film, compared to 22.2% in all other industries, have unfinished degrees. This represents an opportunity for colleges and universities in South Carolina to tap into adult learners and provide industry-specific opportunities for these workers to complete a college degree. Such opportunities also serve as a source of creativity and productivity in the local industry. Meanwhile, the rapid pace of technological changes triggered by AI's profound, deep, and growing impact on all aspects of the film demands that institutions rethink, not just tweak or revise, the current curriculum of educational degree programs, diplomas, and certifications toward building a well-trained workforce that delivers what the film industry needs as it undergoes one of the biggest transformations in its history.

> *"It makes sense to encourage students to learn production and post-production skills. Whether or not they ever go into film — they'll have **highly valuable, highly transferable skills** that they can use for commercial production, social stories, film, music videos, etc."* - Emily Reach White

> Justin Myrick*, a visual effects artist, explained that he recently **used machine learning** to complete what would have been a 2-day project in only 2 hours.*

> Josh Foster *explained that for people who study production design, a degree can "take them to the **next level artistically.**"*

Key Conclusions:

- The Upstate region is rich with talented people and diverse, untold stories.
- Establishing a film industry hub could lead to further creativity and innovation, spurring further economic growth.
- State subsidies are necessary, but not sufficient
- Talent availability drives industry location decisions
- AI is transforming the industry, and is a double-edge sword
- Training and education is key to sustainable competitive advantage
- Geographic context provides opportunities to expand the film industry base

Key Recommendations:

- Develop strategies to grow and keep local talent.
- Infrastructure attracts industry leaders and talent.
- Tell diverse, untold stories.
- Celebrate existing local film industry.

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