

**Program Endorsement Brief: 0604.20/Television (including combined TV/film/video)
Narrative Film Production**

Orange County Center of Excellence, May 2021

Summary Analysis

| | | | |
|--|--|--|--|
| Program Endorsement: | Endorsed: All Criteria Met <input type="checkbox"/> | Endorsed: Some Criteria Met <input checked="" type="checkbox"/> | Not Endorsed <input type="checkbox"/> |
| Program Endorsement Criteria | | | |
| Supply Gap: | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | |
| Living Wage: (Entry-Level, 25th) | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | |
| Education: | Yes <input type="checkbox"/> | No <input checked="" type="checkbox"/> | |
| Emerging Occupation(s) | | | |
| | Yes <input type="checkbox"/> | No <input checked="" type="checkbox"/> | |

The Orange County Center of Excellence for Labor Market Research (COE) prepared this report to provide Los Angeles/Orange County regional labor market supply and demand data related to four middle-skill occupations: *producers and directors (27-2012)*, *camera operators, television, video, and film (27-4031)*, *film and video editors (27-4032)*, and *lighting technicians and media and communication equipment workers, all other (27-4098)*. Middle-skill occupations typically require some postsecondary education, but less than a bachelor’s degree.¹ This report is intended to help determine whether there is demand in the local labor market that is not being met by the supply from community college programs that align with the relevant occupations.

Based on the available data, there appears to be a supply gap for film production occupations in the region. While the majority of annual openings for film production occupations typically require a bachelor’s degree, the majority of openings have entry-level wages that exceed the living wage in both Los Angeles and Orange counties. **Therefore, due to some of the criteria being met, the COE endorses this proposed program.** Detailed reasons include:

Demand:

- **Supply Gap Criteria** – Over the next five years, there is projected to be **5,157 jobs available annually** in the region due to retirements and workers leaving the field, **which is more than the 2,406 awards conferred annually** by educational institutions in the region.

¹ The COE classifies middle-skill jobs as the following:

- All occupations that require an educational requirement of some college, associate degree or apprenticeship;
- All occupations that require a bachelor’s degree, but also have more than one-third of their existing labor force with an educational attainment of some college or associate degree; or
- All occupations that require a high school diploma or equivalent or no formal education, but also require short- to long-term on-the-job training where multiple community colleges have existing programs.

- **Living Wage Criteria** – Within Orange County, the majority (89%) of annual job openings for these film production occupations have entry-level wages above the county's living wage (\$17.36/hour).²
- **Educational Criteria** – Within the LA/OC region, 84% of the annual job openings for occupations related to film production typically require a bachelor's degree.
 - While the national-level educational attainment data indicates between 19.8% and 39.0% of workers in the field have completed some college or an associate degree, the majority of annual openings for these film production occupations have less than one-fourth of workers in the field who have completed some college or an associate degree, between 19.8% and 24.2%, as their highest level of education.

Supply:

- There are **18 community colleges** in the LA/OC region that issue awards related to television and/or film production, conferring an average of **683 awards annually** between 2017 and 2020.
- Between 2016 and 2019, there was an average of **1,723 awards conferred annually** in related training programs by non-community college institutions throughout the region.

Occupational Demand

Exhibit 1 shows the five-year occupational demand projections for these film production occupations. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to decrease by 1% through 2024. However, there will be nearly 5,200 job openings per year through 2024 due to retirements and workers leaving the field.

This report includes employment projection data by Emsi which uses EDD information. Emsi's projections are modeled on recorded (historical) employment figures and incorporate several underlying assumptions, including the assumption that the economy, during the projection period, will be at approximately full employment. To the extent that a recession or labor shock, such as the economic effects of COVID-19, can cause long-term structural change, it may impact the projections. At this time, it is not possible to quantify the impact of COVID-19 on projections of industry and occupational employment. Therefore, the projections included in this report do not take the impacts of COVID-19 into account.

² Living wage data was pulled from California Family Needs Calculator on 5/26/2021. For more information, visit the California Family Needs Calculator website: <https://insightcced.org/2018-family-needs-calculator/>.

Exhibit 1: Occupational demand in Los Angeles and Orange Counties³

| Geography | 2019 Jobs | 2024 Jobs | 2019-2024 Change | 2019-2024 % Change | Annual Openings |
|------------------|------------------|------------------|-------------------------|---------------------------|------------------------|
| Los Angeles | 54,619 | 54,166 | (453) | (1%) | 4,888 |
| Orange | 2,908 | 2,895 | (13) | (0%) | 269 |
| Total | 57,528 | 57,061 | (466) | (1%) | 5,157 |

Wages

The labor market endorsement in this report considers the entry-level hourly wages for these film production occupations in Orange County as they relate to the county’s living wage. Los Angeles County wages are included below in order to provide a complete analysis of the LA/OC region. Detailed wage information, by county, is included in Appendix A.

Orange County— The majority (89%) of annual openings for these film production occupations have entry-level wages above the living wage for one adult (\$17.36 in Orange County). Typical entry-level hourly wages are in a range between \$14.84 and \$26.55. The only occupation in this report with typical entry-level wages below the county’s living wage is *camera operators, television, video, and film*. Experienced workers can expect to earn wages between \$43.35 and \$65.67, which are higher than the living wage estimate. Orange County’s average wages are below the average statewide wage of \$50.30 for these occupations.

Los Angeles County— All of the annual openings for these film production occupations have entry-level wages above the living wage for one adult (\$15.04 in Los Angeles County). Typical entry-level hourly wages are in a range between \$17.48 and \$31.33. Experienced workers can expect to earn wages between \$48.37 and \$74.68, which are higher than the living wage estimate. Los Angeles County’s average wages are above the average statewide wage of \$50.30 for these occupations.

Job Postings

There were 3,067 online job postings related to film production listed in the past 12 months. The highest number of job postings were for video editors, producers, associate producers, videographers, and executive producers. The top skills were: video editing, budgeting, social media, Adobe Photoshop, and scheduling. The top three employers, by number of job postings, in the region were: Blizzard Entertainment, Charter Communications, and Amazon.

It is important to note that the job postings data included in this section reflects online job postings listed in the past 12 months and does not yet demonstrate the impact of COVID-19. While employers have generally posted fewer online job postings since the beginning of the pandemic, the long-term effects are currently unknown.

Educational Attainment

The Bureau of Labor Statistics (BLS) lists the following typical entry-level education levels for the occupations in this report:

³ Five-year change represents new job additions to the workforce. Annual openings include new jobs and replacement jobs that result from retirements and separations.

- **Bachelor's degree:** *producers and directors; camera operators, television, video, and film; and film and video editors*
- **High school diploma:** *lighting technicians and media and communication equipment workers, all other*

In the LA/OC region, the majority of annual job openings (84%) typically require a bachelor's degree. While the national-level educational attainment data indicates between 19.8% and 39.0% of workers in the field have completed some college or an associate degree, the majority of annual openings for these film production occupations have less than one-fourth of workers in the field who have completed some college or an associate degree, between 19.8% and 24.2%, as their highest level of education. Of the 37% of film production job postings listing a minimum education requirement in Los Angeles/Orange County, 84% (943) requested a bachelor's degree, 14% (154) requested a high school diploma and 2% (28) requested an associate degree.

Educational Supply

Community College Supply—Exhibit 2 shows the three-year average number of awards conferred by community colleges in the related TOP codes: Radio and Television (0604.00), Television (including combined TV/film/video) (0604.20), and Film Production (0612.20). The colleges with the most completions in the region are: Saddleback, LA City, LA Valley, and Orange Coast. Over the past 12 months, there were 13 other related program recommendation requests from regional community colleges.

Exhibit 2: Regional community college awards (certificates and degrees), 2017-2020

| TOP Code | Program | College | 2017-2018 Awards | 2018-2019 Awards | 2019-2020 Awards | 3-Year Award Average |
|--------------------------------|---|--------------------|------------------|------------------|------------------|----------------------|
| 0604.00 | Radio and Television | LA Valley | 14 | 16 | 17 | 16 |
| | | Long Beach | 10 | 4 | 2 | 5 |
| | | Mt San Antonio | - | 2 | - | 1 |
| | | Santa Monica | 27 | 8 | 29 | 21 |
| | | LA Subtotal | 51 | 30 | 48 | 43 |
| | | Fullerton | 2 | 3 | - | 2 |
| | | Saddleback | 40 | 206 | 136 | 127 |
| | | Santa Ana | - | 5 | - | 2 |
| | | Santiago Canyon | 2 | - | - | 1 |
| | | OC Subtotal | 44 | 214 | 136 | 131 |
| Supply Subtotal/Average | | | 95 | 244 | 184 | 174 |
| 0604.20 | Television (including combined TV/Film/Video) | Compton | 2 | - | - | 1 |
| | | El Camino | 20 | 20 | 22 | 21 |
| | | Glendale | 2 | 8 | 14 | 8 |
| | | LA City | 56 | 39 | 34 | 43 |

| TOP Code | Program | College | 2017-2018 Awards | 2018-2019 Awards | 2019-2020 Awards | 3-Year Award Average |
|--------------------------------|-----------------|--------------------|------------------|------------------|------------------|----------------------|
| | | LA Pierce | 5 | 11 | 26 | 14 |
| | | LA Valley | 20 | 29 | 31 | 27 |
| | | Long Beach | 9 | 39 | 35 | 28 |
| | | Mt San Antonio | 21 | 48 | 54 | 41 |
| | | Pasadena | 9 | 25 | 45 | 26 |
| | | LA Subtotal | 144 | 219 | 261 | 208 |
| | | Cypress | - | 3 | 15 | 6 |
| | | Fullerton | 27 | 56 | 48 | 44 |
| | | Orange Coast | 5 | 19 | 40 | 21 |
| | | Saddleback | 6 | 2 | 2 | 3 |
| | | Santa Ana | 11 | 14 | 17 | 14 |
| | | OC Subtotal | 49 | 94 | 122 | 88 |
| Supply Subtotal/Average | | | 193 | 313 | 383 | 296 |
| 0612.20 | Film Production | Cerritos | 6 | 10 | 8 | 8 |
| | | LA City | 34 | 61 | 62 | 52 |
| | | LA Valley | 10 | 42 | 31 | 28 |
| | | Long Beach | 4 | 3 | - | 2 |
| | | Santa Monica | 27 | 40 | 59 | 42 |
| | | West LA | 37 | 33 | 7 | 26 |
| | | LA Subtotal | 118 | 189 | 167 | 158 |
| | | Orange Coast | 48 | 49 | 48 | 48 |
| | | Saddleback | 9 | 7 | 3 | 6 |
| | | OC Subtotal | 57 | 56 | 51 | 55 |
| Supply Subtotal/Average | | | 175 | 245 | 218 | 213 |
| Supply Total/Average | | | 463 | 802 | 785 | 683 |

Non-Community College Supply—For a comprehensive regional supply analysis, it is also important to consider the supply from other institutions in the region that provide training programs for film production. Exhibit 3 shows the annual and three-year average number of awards conferred by these institutions in the related Classification of Instructional Programs (CIP) Codes: Radio and Television (09.0701), Radio and Television Broadcasting Technology/Technician (10.0202), Cinematography and Film/Video Production (50.0602), and Film/Video and Photographic Arts, Other (50.0699). Due to different data collection periods, the most recent three-year period of available data is from 2016 to 2019. Between 2016 and 2019, four-year colleges in the region conferred an average of 1,723 awards annually in related training programs.

Exhibit 3: Regional non-community college awards, 2016-2019

| CIP Code | Program | College | 2016-2017 Awards | 2017-2018 Awards | 2018-2019 Awards | 3-Year Award Average |
|-----------------------------|--|---|-------------------------|-------------------------|-------------------------|-----------------------------|
| 09.0701 | Radio and Television | CSU-Fullerton | 191 | 174 | 205 | 190 |
| | | CSU -Long Beach | - | - | 1 | 0 |
| | | CSU -Los Angeles | 152 | 174 | 158 | 161 |
| | | CSU -Northridge | 448 | 414 | 399 | 420 |
| | | Pepperdine University | 26 | 26 | 25 | 26 |
| | | The Academy of Radio and TV Broadcasting | 11 | 23 | 34 | 23 |
| | | University of La Verne | 9 | 11 | 22 | 14 |
| 10.0202 | Radio and Television Broadcasting Technology/ Technician | East San Gabriel Valley ROP | 13 | 18 | 1 | 11 |
| | | National Polytechnic College | - | - | - | - |
| | | The Academy of Radio and TV Broadcasting | 3 | 13 | 3 | 6 |
| 50.0602 | Cinematography and Film/Video Production | Art Center College of Design | 32 | 28 | 18 | 26 |
| | | Biola University | 49 | 42 | 62 | 51 |
| | | California Institute of the Arts | 17 | 10 | 11 | 13 |
| | | Chapman University | 162 | 160 | 174 | 165 |
| | | Fashion Institute of Design & Merchandising-Los Angeles | 14 | 13 | 14 | 14 |
| | | Los Angeles Film School | 77 | 145 | 220 | 147 |
| | | Loyola Marymount Univ. | 82 | 71 | 71 | 75 |
| | | Mount Saint Mary's Univ. | 16 | 8 | 12 | 12 |
| | | New York Film Academy | 94 | 230 | 205 | 176 |
| | | University of La Verne | 1 | - | - | 0 |
| | | Univ. of Southern California | 96 | 101 | 105 | 101 |
| | | Woodbury University | 8 | 16 | 13 | 12 |
| 50.0699 | Film/Video and Photographic Arts, Other | California Institute of the Arts | 38 | 45 | 41 | 41 |
| | | Los Angeles Film School | - | 30 | 34 | 21 |
| | | Woodbury University | 9 | 18 | 24 | 17 |
| Supply Total/Average | | | 1,548 | 1,770 | 1,852 | 1,723 |

Appendix A: Occupational demand and wage data by county

Exhibit 4. Orange County

| Occupation (SOC) | 2019 Jobs | 2024 Jobs | 5-Yr Change | 5-Yr % Change | Annual Openings | Entry-Level Hourly Earnings (25 th Percentile) | Median Hourly Earnings | Experienced Hourly Earnings (75 th Percentile) |
|---|--------------|--------------|-------------|---------------|-----------------|---|------------------------|---|
| Producers and Directors (27-2012) | 1,481 | 1,448 | (32) | (2%) | 123 | \$26.55 | \$41.56 | \$65.67 |
| Camera Operators, Television, Video, and Film (27-4031) | 284 | 305 | 21 | 8% | 30 | \$14.84 | \$25.04 | \$43.75 |
| Film and Video Editors (27-4032) | 449 | 503 | 54 | 12% | 52 | \$19.63 | \$32.76 | \$59.10 |
| Lighting Technicians and Media and Communication Equipment Workers, All Other (27-4098) | 695 | 639 | (56) | (8%) | 65 | \$21.27 | \$36.83 | \$43.35 |
| Total | 2,908 | 2,895 | (13) | (0%) | 269 | | | |

Exhibit 5. Los Angeles County

| Occupation (SOC) | 2019 Jobs | 2024 Jobs | 5-Yr Change | 5-Yr % Change | Annual Openings | Entry-Level Hourly Earnings (25 th Percentile) | Median Hourly Earnings | Experienced Hourly Earnings (75 th Percentile) |
|---|---------------|---------------|--------------|---------------|-----------------|---|------------------------|---|
| Producers and Directors (27-2012) | 29,555 | 28,776 | (779) | (3%) | 2,431 | \$31.33 | \$47.99 | \$74.68 |
| Camera Operators, Television, Video, and Film (27-4031) | 5,005 | 5,248 | 242 | 5% | 495 | \$17.48 | \$28.72 | \$48.37 |
| Film and Video Editors (27-4032) | 12,002 | 12,473 | 471 | 4% | 1,179 | \$24.74 | \$39.04 | \$69.22 |
| Lighting Technicians and Media and Communication Equipment Workers, All Other (27-4098) | 8,057 | 7,670 | (387) | (5%) | 783 | \$23.75 | \$41.29 | \$48.63 |
| Total | 54,619 | 54,166 | (453) | (1%) | 4,888 | | | |

Exhibit 6. Los Angeles and Orange Counties

| Occupation (SOC) | 2019 Jobs | 2024 Jobs | 5-Yr Change | 5-Yr % Change | Annual Openings |
|---|----------------------|----------------------|------------------------|--------------------------|----------------------------|
| Producers and Directors (27-2012) | 31,035 | 30,224 | (811) | (3%) | 2,554 |
| Camera Operators, Television, Video, and Film (27-4031) | 5,289 | 5,552 | 264 | 5% | 525 |
| Film and Video Editors (27-4032) | 12,451 | 12,975 | 525 | 4% | 1,231 |
| Lighting Technicians and Media and Communication Equipment Workers, All Other (27-4098) | 8,753 | 8,309 | (443) | (5%) | 848 |
| Total | 57,528 | 57,061 | (466) | (1%) | 5,157 |

Appendix B: Sources

- O*NET Online
- Labor Insight/Jobs (Burning Glass)
- Economic Modeling Specialists, International (Emsi)
- Bureau of Labor Statistics (BLS)
- Employment Development Department, Labor Market Information Division, OES
- California Community Colleges Chancellor’s Office Management Information Systems (MIS)
- California Family Needs Calculator, Insight Center for Community Economic Development
- Chancellor’s Office Curriculum Inventory (COCI 2.0)

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