

Program Endorsement Brief: 1012.00/Applied Photography, 0612.20/Film Production, & 0614.00/Digital Media Basic Drone Skills Drone Photography Drone Videography Orange County Center of Excellence, March 2020

#### **Summary Analysis**

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 three middle-skill occupations: Photographers (SOC code 27-4021), Camera Operators, Television, Video, and Motion Picture (SOC code 27-4031), and Film and Video Editors (SOC code 27-4032). Middle-skill occupations typically require some postsecondary education, but less than a bachelor's degree.<sup>1</sup> Although two occupations, Camera Operators, Television, Video, and Motion Picture and Film and Video Editors, in this report typically require a bachelor's degree, they are considered middle-skill because approximately one-third of workers in the field have completed some college or an associate degree.

These three occupations have a high degree of self-employment, particularly in Orange County. Over 50% of workers in all three occupations are self-employed in Orange County. To better understand the differences in the number of workers that are self-employed and wages for selfemployed and traditionally employed workers, the Occupational Demand and Wages sections of this report are divided into two groups: wage and salaried workers and self-employed workers. Wage and salaried workers are those who receive a paycheck from their employer, while selfemployed workers are those for which self-employment is their primary form of income.<sup>2</sup> It is important to note that wages for self-employed workers could be misleading because selfemployment income tends to be underreported.<sup>3</sup>

Because these programs add drone piloting and image capture skills to photography and videography, this report also includes an analysis of online job postings that request drone piloting knowledge and skills. 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 these photography and videography occupations in the region. However, two of the occupations in this report (Photographers and Camera Operators, Television, Video, and Motion Picture) have entry-level

<sup>&</sup>lt;sup>1</sup> The COE classifies middle-skill jobs as the following:

<sup>•</sup> All occupations that require an educational requirement of some college, associate degree or apprenticeship;

<sup>•</sup> 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.
 <sup>2</sup> For more information, visit <u>https://kb.emsidata.com/methodology/class-of-worker-explained/</u>.

<sup>&</sup>lt;sup>3</sup> Czajka, J. L., Patnaik, A., & Negoita, M. (2018, November). Data on Earnings: A Review of Resources for Research. Retrieved March 23, 2020, from https://www.dol.gov/sites/dolgov/files/OASP/legacy/files/Data-on-Earnings-Report.pdf.

wages significantly below the California Family Needs Calculator hourly wage (living wage) in Orange County. Though entry-level wages for these occupations are below the living wage, over 50% of workers in both occupations are self-employed in Orange County. This high degree of self-employment pulls wages down because self-employed workers may not report all earnings, such as those made from cash transactions, so wages may be misleading. **Therefore, the COE cautiously endorses this proposed program.** Reasons include:

## Demand:

- Over the next five years, there is projected to be 3,062 jobs available annually in the region due to new job growth and replacements, which is more than the 1,979 awards conferred annually by educational institutions in the region.
- Over the past 12 months, there were **2,096 online job postings related to these** occupations. The highest number of job postings were for photographer, video editor, and videographer.
  - Of those, **3% (65) requested drone piloting skills**. The highest number of job postings that requested drone skills were for photographer, real estate photographer, and videographer.
- The national-level educational attainment data indicates between 30% and 33.8% of workers in the field have completed some college or an associate degree as their highest level of education.
- Typical entry-level hourly wages for these occupations are between \$12.97 and \$23.33. However, reported wages vary greatly for self-employed and wage and salaried workers.
  - Typical entry-level hourly wages for Photographers are \$13.14 in Los Angeles County and \$12.24 in Orange County, which is lower than the California Family Needs Calculator hourly wage (living wage) for one adult in each county. (\$15.04 in Los Angeles County and \$17.36 in Orange County).<sup>4</sup>
    - Typical entry-level hourly wages for this occupation in Los Angeles
       County are \$11.34 for self-employed workers and \$15.02 for wage
       and salary workers.
    - Typical entry-level hourly wages for this occupation in Orange County are \$11.42 for self-employed workers and \$13.47 for wage and salary workers.
  - Typical entry-level wages for Camera Operators, Television, Video, and Motion Picture are \$14.75 in Orange County, which is below the living wage for one adult in that county. However, typical entry-level wages for this occupation in Orange County are \$9.91 for self-employed workers and \$18.55 for wage and salaried workers.
  - All occupations in this report have median wages between \$23.77 and \$35.32, which is above the living wage for both counties. Median wages for

<sup>&</sup>lt;sup>4</sup> Living wage data was pulled from California Family Needs Calculator on 2/24/20. For more information, visit the California Family Needs Calculator website: <u>https://insightcced.org/2018-family-needs-calculator/</u>.

both wage and salaried and self-employed workers in all three occupations are above each county's living wage.

## Supply:

- There are **21 community colleges** in the region that have programs that train for the occupations in this report, conferring an average of **766 awards annually** between 2016 and 2019.
  - However, only two colleges (Cypress and Mt. San Antonio) have programs related to drone photography or videography.

 Between 2013 and 2016, there were an average of 1,213 awards conferred annually in related training programs by non-community college institutions, all of which were generated by 12 individual four-year colleges throughout the region.

• However, none of these programs have an emphasis on drone photography or videography.

## **Occupational Demand**

Exhibit 1 shows the five-year occupational demand projections for these photography and videography occupations. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to increase by 4% through 2023. There will be more than 3,060 job openings per year through 2023 due to job growth and replacements.

Geography	2018 Jobs	2023 Jobs	2018-2023 Change	2018-2023 % Change	Annual Openings
Los Angeles	24,860	25,846	986	4%	2,744
Orange	2,718	2,883	165	6%	318
Total	27,578	28,729	1,151	4%	3,062

#### Exhibit 1: Occupational demand in Los Angeles and Orange Counties<sup>5</sup>

## Wage and Salaried Workers

Exhibit 2 shows the five-year occupational demand projections for wage and salaried workers. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to increase by 1% through 2023. Wage and salaried workers account for 62% of workers in these three occupations in Los Angeles County and 32% in Orange County.

<sup>&</sup>lt;sup>5</sup> Five-year change represents new job additions to the workforce. Annual openings include new jobs and replacement jobs that result from retirements and separations.

Geography	2018 Jobs	2023 Jobs	2018-2023 Change	2018-2023 % Change	Annual Openings
Los Angeles	15,444	15,602	158	1%	1,611
Orange	864	875	11	1%	97
Total	16,309	16,478	169	1%	1,708

## Exhibit 2: Occupational demand for wage and salaried workers in Los Angeles and Orange Counties

## Self-Employed Workers

Exhibit 3 shows the five-year occupational demand projections for self-employed workers. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to increase by 8% through 2023. This increase is projected to add over 1,500 more self-employed jobs than wage and salaried jobs over the next five years. Self-employed workers account for 38% of workers in these three occupations in Los Angeles County and 68% in Orange County.

## Exhibit 3: Occupational demand for self-employed workers in Los Angeles and Orange Counties

Geography	2018 Jobs	2023 Jobs	2018-2023 Change	2018-2023 % Change	Annual Openings
Los Angeles	9,416	10,244	828	9%	1,133
Orange	1,854	2,007	153	8%	221
Total	21,802	23,484	1,682	8%	2,569

## Wages

Typical entry-level hourly wages for these photography and videography occupations are between \$12.97 and \$23.33.<sup>6</sup> Because these occupations have a high degree of selfemployment, particularly in Orange County, it is important to consider the differences in wages for wage and salaried workers versus those for self-employed workers. The following sections show the differences in typical entry-level, median, and experienced earnings for each group. Wage information for both groups, by county, is included in Appendix A.

## Wage and Salaried Workers

Exhibit 4, on the following page, shows the typical entry-level, median, and experienced hourly wages for wage and salaried workers in each county for these three occupations. In Los Angeles County, typical entry-level hourly wages range from \$15.30 to \$26.13, all of which are above the living wage estimate of \$15.04 for Los Angeles County. In Orange County, typical entry-level hourly wages are between \$13.77 and \$23.43. Typical entry-level hourly wages for wage and salaried Photographers are \$13.77, which is significantly below the regional living wage of \$17.36 in Orange County. Wage and salaried workers in all three occupations can expect to earn median hourly wages above both counties' living wage estimates.

<sup>&</sup>lt;sup>6</sup> Entry-level wage is defined as the twenty-fifth percentile hourly wage. Wages for experienced workers are defined as the seventy-fifth percentile hourly wage.

County	Occupation (SOC)	Entry- Level Hourly Earnings (25 <sup>th</sup> Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 <sup>th</sup> Percentile)
	Photographers (27-4021)	\$15.30	\$26.72	\$38.37
Los Angeles	Camera Operators, Television, Video, and Motion Picture (27-4031)	\$20.70	\$33.50	\$46.70
	Film and Video Editors (27-4032)	\$26.13	\$36.70	\$72.76
	Photographers (27-4021)	\$13.77	\$23.71	\$33.85
Orange	Camera Operators, Television, Video, and Motion Picture (27-4031)	\$18.55	\$30.01	\$41.89
	Film and Video Editors (27-4032)	\$23.43	\$32.92	\$65.22

#### Self-Employed Workers

Exhibit 5 shows the typical entry-level, median, and experienced hourly wages for self-employed workers in each county for these three occupations. In Los Angeles County, typical entry-level hourly wages range from \$9.67 to \$13.82, all of which are below the living wage estimate for that county. In Orange County, typical entry-level hourly wages are between \$9.91 and \$13.82, all of which are significantly below the living wage for that county.

While typical entry-level wages for self-employed workers in these occupations are below each county's living wage, it is important to note that self-employed earnings could be misleading because self-employment income is typically underreported. Additionally, while typical entry-level hourly wages for self-employed workers in these occupations are below the living wage in both counties, median wages for self-employed workers are above it.

County	Occupation (SOC)	Entry- Level Hourly Earnings (25 <sup>th</sup> Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 <sup>th</sup> Percentile)
	Photographers (27-4021)	\$11.34	\$22.67	\$45.64
Los Angeles	Camera Operators, Television, Video, and Motion Picture (27-4031)	\$9.67	\$20.00	\$38.10
	Film and Video Editors (27-4032)	\$13.53	\$28.00	\$53.33
	Photographers (27-4021)	\$11.42	\$22.84	\$45.98
Orange	Camera Operators, Television, Video, and Motion Picture (27-4031)	\$9.91	\$20.50	\$39.04
	Film and Video Editors (27-4032)	\$13.82	\$28.59	\$54.45

**Job Postings**—There were 2,096 online job postings related to these photography and videography occupations listed in the past 12 months. The highest number of job postings were for photographer, video editor, and videographer. The top skills were photography, video editing, adobe photoshop, videography, and social media. The top three employers, by number of job postings, in the region were Mom365, Lifetouch, and Iconic Group. Of the 2,096 online job postings, 17% (361) listed a minimum education requirement.

To identify job postings that requested drone piloting skills, a keyword filter was applied to the full list of job postings related to photography and videography. The keywords used for the filter are listed in Appendix A. Of the 2,096 online job postings, 65 requested drone piloting skills. The highest number of job postings were for photographer, real estate photographer, and videographer. The top skills were photography, videography, scheduling, adobe photoshop, and customer service. The top three employers, by number of job postings, were Costar Group, Virtuance, and The Luxury Level. Of these 65 postings, only 8% (5) listed a minimum education requirement.

**Educational Attainment**—The Bureau of Labor Statistics (BLS) lists a high school diploma or equivalent as the typical entry-level education for Photographers and a bachelor's degree as the typical entry-level education for Camera Operators, Television, Video, and Motion Picture and Film and Video Editors. The national-level educational attainment data indicates between 30% and 33.8% of workers in the field have completed some college or an associate degree. Of the 17% of job postings listing a minimum education requirement in Los Angeles/Orange County, 87% (315) requested a high school diploma or vocational training and 13% (46) requested an associate degree.

## Supply

**Community College Supply**—Exhibit 2, on the following page, shows the three-year average number of awards conferred by community colleges in the related TOP codes: Radio and Television (0604.00), Television (0604.20), Film Production (0612.20), Photography (1011.00) and Applied Photography (1012.00).

It is important to note that, while all these programs train students to enter the occupations in this report, only two of them have an emphasis on drone photography or videography. According to the Chancellor's Office Curriculum Inventory (COCI 2.0), Cypress has a program titled "UAV/UAS Drone Photography and Video" and Mt. San Antonio has a program titled "Drone Camera Operator," both of which are listed under the Applied Photography (1012.00) TOP Code.<sup>7</sup> However, since awards data is collected and reported by TOP code- and because colleges can offer multiple programs listed under the same TOP code- the COE is unable to quantify the exact amount of awards that were conferred in programs specifically related to drone photography and videography.

Over the past 12 months, there were four other program recommendation requests related to photography or videography from regional community colleges. None of these requests had an emphasis on drone photography or videography.

<sup>7 &</sup>lt;u>https://coci2.ccctechcenter.org/programs</u>

TOP Code	Program	College	2016- 2017 Awards	2017- 2018 Awards	2018- 2019 Awards	3-Year Award Average
		LA Valley	10	14	16	13
		Long Beach	6	10	-	8
		Mt San Antonio	-	-	2	2
		Santa Monica	19	27	8	18
0604.00	Radio and	LA Subtotal	35	51	26	37
0004.00	Television	Fullerton	-	2	3	3
		Saddleback	69	40	206	105
		Santa Ana	-	-	5	5
		Santiago Canyon	-	2	2	2
		OC Subtotal	69	44	216	110
	Supp	ly Subtotal/Average	104	95	242	147
		Compton	3	2	-	3
		El Camino	19	20	20	20
		Glendale	8	2	8	6
		LA City	96	56	40	64
		LA Pierce	-	5	9	7
		LA Valley	30	20	28	26
	Television	Long Beach	-	9	-	9
0604.20	(including	Mt San Antonio	16	21	48	28
0004.20	combined	Pasadena	4	9	25	13
	TV/Film/Video)	LA Subtotal	176	144	178	166
		Cypress	-	-	3	3
		Fullerton	24	27	56	36
		Orange Coast	-	5	19	12
		Saddleback	6	6	2	5
		Santa Ana	5	11	11	9
		OC Subtotal	35	49	91	58
	Supp	ly Subtotal/Average	211	193	269	224
		Cerritos	5	6	-	6
		LA City	58	34	58	50
		LA Valley	12	10	41	21
0612.20	Film Production	Long Beach	-	4	-	4
		Santa Monica	24	27	40	30
		West LA	29	37	26	31
		LA Subtotal	128	118	165	137

Exhibit 2: Regional community college awards (certificates and degrees), 2016-2019

TOP Code	Program	College	2016- 2017 Awards	2017- 2018 Awards	2018- 2019 Awards	3-Year Award Average
		Orange Coast	36	48	49	44
		Saddleback	7	9	7	8
		OC Subtotal	43	57	56	52
	Supp	ly Subtotal/Average	171	175	221	189
		Cerritos	1	3	-	2
		Citrus	-	12	9	11
		Glendale	3	9	8	7
		LA City	20	13	-	17
		Pasadena	8	-	-	8
1011.00	Photography	Rio Hondo	3	-	5	4
		LA Subtotal	35	37	22	31
		Orange Coast	2	-	-	2
		Saddleback	4	4	2	3
		Santa Ana	4	2	8	5
		OC Subtotal	10	6	10	9
	Supp	ly Subtotal/Average	45	43	32	40
		East LA	5	17	20	14
		El Camino	7	8	10	8
		LA City	28	11	37	25
		Long Beach	1	2	-	2
		Mt San Antonio	15	21	40	25
1012.00	Applied	Pasadena	-	15	10	13
1012.00	Photography	Santa Monica	21	25	23	23
		LA Subtotal	77	99	140	105
		Cypress	34	11	5	17
		Fullerton	12	22	20	18
		Orange Coast	14	30	32	25
		OC Subtotal	60	63	57	60
	Supp	ly Subtotal/Average	137	162	197	165
	S	upply Total/Average	668	668	961	766

**Non-Community College Supply**—It is important to consider the supply from four-year institutions in the region that provide training programs for the occupations in this report. 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) and Cinematography and Film/Video Production (50.0602). Due to different data collection periods, the most recent three-year period of available data is from 2013 to 2016. Between 2013 and

2016, four-year colleges in the region conferred an average of 1,213 awards annually in related training programs. While these programs train students for the occupations analyzed in this report, none of them have an emphasis on drone photography or videography.

CIP Code	Program	College	2013- 2014 Awards	2014- 2015 Awards	2015- 2016 Awards	3-Year Award Average
		California State University-Los Angeles	124	144	187	152
		California State University- Northridge	408	414	414	412
		Loyola Marymount University	0	1	0	0
09.0701	Radio and Television	Pepperdine University	21	24	23	23
		LA Subtotal	553	583	624	587
		California State University-Fullerton	222	202	198	207
	The Academy of Radio and TV Broadcasting	36	11	20	22	
		OC Subtotal	258	213	218	230
		Supply Subtotal/Average	811	796	842	816
		Art Center College of Design	29	22	24	25
		Biola University	59	47	46	51
		Loyola Marymount University	75	67	50	64
	Characteristic	University of Southern California	109	100	89	99
50.0602	Cinematography and Film/Video	Woodbury University	1	10	5	5
30.0002	Production	LA Subtotal	273	246	214	244
		Argosy University-The Art Institute of California-Orange County	11	14	19	15
		Chapman University	130	165	119	138
		OC Subtotal	141	179	138	153
		Supply Subtotal/Average	414	425	352	397
		Supply Total/Average	1,225	1,221	1,194	1,213

# Exhibit 3: Regional non-community college awards, 2013-2016

# Appendix A: Occupational demand and wage data by county, all workers

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Occupation (SOC)	2018 Jobs	2023 Jobs	5-Yr Change	5-Yr % Change	Annual Openings	Entry- Level Hourly Earnings (25 <sup>th</sup> Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 <sup>th</sup> Percentile)
Photographers (27-4021)	8,105	8,265	160	2%	892	\$13.14	\$23.95	\$41.83
Camera Operators, Television, Video, and Motion Picture (27-4031)	4,799	5,081	282	6%	541	\$18.21	\$30.43	\$45.33
Film and Video Editors (27-4032)	11,956	12,500	544	5%	1,311	\$23.47	\$35.43	\$67.75
Total	24,860	25,846	986	4%	2,744			

## Exhibit 4. Los Angeles County

# Exhibit 5. Orange County

Occupation (SOC)	2018 Jobs	2023 Jobs	5-Yr Change	5-Yr % Change	Annual Openings	Entry- Level Hourly Earnings (25 <sup>th</sup> Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 <sup>th</sup> Percentile)
Photographers (27-4021)	2,128	2,221	93	4%	243	\$12.24	\$23.12	\$39.95
Camera Operators, Television, Video, and Motion Picture (27-4031)	214	232	18	8%	25	\$14.75	\$25.54	\$40.80
Film and Video Editors (27-4032)	375	429	54	14%	50	\$18.53	\$31.20	\$58.14
Total	2,718	2,883	165	<b>6</b> %	318			

		Exhibit 6	Los Ange	les and O	range Counti	ies		
Occupation (SOC)	2018 Jobs	2023 Jobs	5-Yr Change	5-Yr % Change	Annual Openings	Entry- Level Hourly Earnings (25 <sup>th</sup> Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 <sup>th</sup> Percentile)
Photographers (27-4021)	10,234	10,486	252	2%	1,135	\$12.97	\$23.77	\$41.49
Camera Operators, Television, Video, and Motion Picture (27-4031)	5,013	5,314	301	6%	566	\$18.09	\$30.12	\$45.17
Film and Video Editors (27-4032)	12,331	12,929	598	5%	1,361	\$23.33	\$35.32	\$67.04
Total	27,578	28,729	1,151	4%	3,062			
Appendix B: Keywords used in job postings filter• Aerial• Part 107• Unmanned aerial system pilot• Autonomous pilot• Part 107 pilot• Unmanned aerial system pilot• Autonomous pilot• SUAS• Unmanned aerial vehicle operator• Capture specialist• UAS• Unmanned aerial vehicle operator• Drone• UAS mechanic• Unmanned aerial vehicle pilot• Drone image capture• UAS Operator• Unmanned aerial vehicle pilot• Drone operations• UAS technician• Unmanned aircraft system operator								
<ul><li>Drone o</li><li>Drone p</li></ul>	hy		V mechanic V operator		<ul> <li>Unmanned aircraft system pilot</li> <li>Unmanned aircraft</li> </ul>			

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- Unmanned aircraft • vehicle operator
  - Unmanned aircraft vehicle pilot

• Drone technician

• Drone pilot

- Drone videography •
- FAA •

## **Appendix C: 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

UAV pilot

UAV technician

Unmanned aerial

system operator

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- Employment Development Department, Unemployment Insurance Dataset ٠
- Living Insight Center for Community Economic Development ٠

- 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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