

Program Endorsement Brief: 0614.00/Digital Media

Digital Art Associate of Science

Digital Art and Production Certificate

Graphic Design Foundation Certificate

UX and Web Design Certificate

Orange County Center of Excellence, June 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: *web developers and digital interface designers* (15-1257), *special effects artists and animators* (27-1014), *graphic designers* (27-1024), and *prepress technicians and workers* (51-5111). 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 middle-skill digital media occupations in the region. While the majority of annual openings for the occupations in this report have entry-level wages that exceed the living wage in both Los Angeles and Orange counties, the majority of annual openings for these occupations typically require a bachelor's degree.

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 **3,274 jobs available annually** in the region due to retirements and workers leaving the field,

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.

which is more than the 1,422 awards conferred annually by educational institutions in the region.

- **Living Wage Criteria** – Within Orange County, **the majority (79%) of annual job openings** for these middle-skill digital media occupations have **entry-level wages above the county's living wage** (\$17.36/hour).²
- **Educational Criteria** – Within the LA/OC region, **72% of the annual job openings** for middle-skill occupations related to digital media **typically require a bachelor's degree**.
 - While the national-level educational attainment data indicates between 25.8% and 38.8% of workers in the field have completed some college or an associate degree, **the three middle-skill digital media occupations with the majority of the annual openings have 26% or fewer workers in the field who have completed some college or an associate degree**.

Supply:

- There are **26 community colleges** in the LA/OC region that issue awards related to digital media, web development and/or graphic design, conferring an average of **455 awards annually** between 2017 and 2020.
- Between 2016 and 2019, there was an average of **967 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 middle-skill digital media occupations. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to decrease by 2% through 2024. However, there will be nearly 3,300 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 6/23/2021. 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	29,337	28,671	(665)	(2%)	2,563
Orange	8,422	8,232	(190)	(2%)	711
Total	37,759	36,904	(855)	(2%)	3,274

Wages

The labor market endorsement in this report considers the entry-level hourly wages for these middle-skill digital media 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 (79%) of annual openings for these middle-skill digital media 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 \$14.57 and \$21.26. While *web developers and digital interface designers* and *graphic designers* have entry-level wages above the county's living wage, *special effects artists and animators* and *prepress technicians and workers* have typical entry-level wages below the living wage (\$14.57 and \$15.35, respectively). Experienced workers can expect to earn wages between \$24.21 and \$48.96, which are higher than the living wage estimate. Orange County's average wages are below the average statewide wage of \$35.88 for these occupations.

Los Angeles County— All of the annual openings for these middle-skill digital media 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 \$15.26 and \$22.53. Experienced workers can expect to earn wages between \$23.98 and \$59.30, which are higher than the living wage estimate. Los Angeles County's average wages are slightly below the average statewide wage of \$35.79 for these occupations.

Job Postings

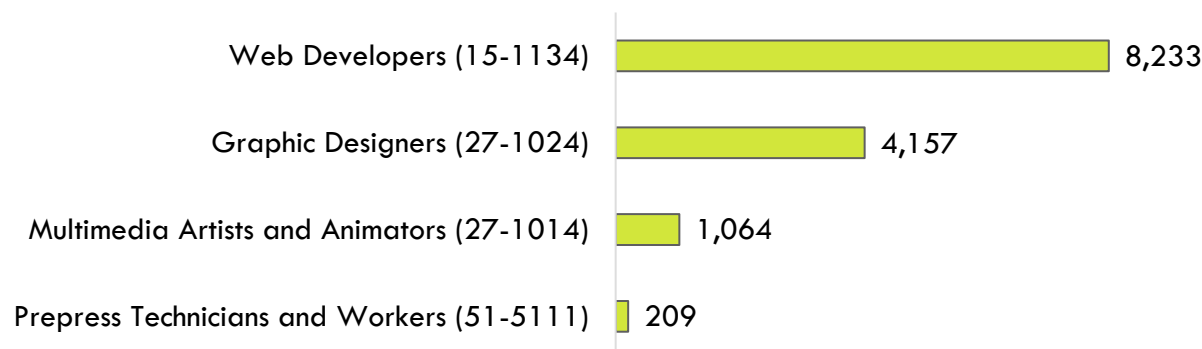
There were 13,663 online job postings related to middle-skill digital media occupations listed in the past 12 months. Exhibit 2 displays the job postings by occupation. The vast majority of job postings (91%) were for *web developers and graphic designers*, followed by *multimedia artists and animators* (8%), and *prepress technicians and workers* (2%). The job titles used most often in job postings were graphic designers, front end developers, web developers, UX designers, and junior graphic designers. The top skills were: Adobe Photoshop, graphic design, JavaScript, Adobe Illustrator, and Adobe InDesign. The top three employers, by number of job postings, in the region were: Anthem Blue Cross, Blizzard Entertainment, 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

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.

have generally posted fewer online job postings since the beginning of the pandemic, the long-term effects are currently unknown.

Exhibit 2: Job postings by occupation (last 12 months)



Educational Attainment

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

- **Bachelor's degree:** *special effects artists and animators; graphic designers*
- **Associate degree:** *web developers and digital interface designers*
- **Postsecondary non-degree award:** *prepress technicians and workers*

In the LA/OC region, the majority of annual job openings (72%) typically require a bachelor's degree. While the national-level educational attainment data indicates between 25.8% and 38.8% of workers in the field have completed some college or an associate degree, the three middle-skill digital media occupations with the majority of the annual openings have 26% or fewer workers in the field who have completed some college or an associate degree. Of the 48% of middle-skill digital media job postings listing a minimum education requirement in Los Angeles/Orange County, 89% (5,899) requested a bachelor's degree, 8% (511) requested a high school diploma and 3% (203) requested an associate degree.

Educational Supply

Community College Supply—Exhibit 3 shows the three-year average number of awards conferred by community colleges in the related TOP codes: Digital Media (0614.00), Multimedia (0614.10), Website Design and Development (0614.30), Desktop Publishing (0614.50), Computer Graphics and Digital Imagery (0614.60), World Wide Web Administration (0709.00), E-Commerce (technology emphasis) (0709.10), Printing and Lithography (0936.00), and Graphic Art and Design (1030.00). The colleges with the most completions in the region are: Golden West, Santa Monica, and Orange Coast. Over the past 12 months, there were 23 other related program recommendation requests from regional community colleges.

Exhibit 3: 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
0614.00	Digital Media	Glendale	-	-	1	0
		LA Mission	-	1	4	2
		LA Trade	7	19	11	12
		Long Beach	1	-	-	0
		Rio Hondo	-	-	2	1
		LA Subtotal	8	20	18	15
		Coastline	-	3	-	1
		Golden West	9	10	10	10
		Irvine	15	9	1	8
		Santa Ana	-	-	1	0
		OC Subtotal	24	22	12	19
		Supply Subtotal/Average	32	42	30	35
0614.10	Multimedia	East LA	-	-	2	1
		LA Mission	12	21	18	17
		Long Beach	1	-	-	0
		Pasadena	5	6	1	4
		Santa Monica	5	5	5	5
		LA Subtotal	23	32	26	27
		Cypress	1	-	1	1
		Orange Coast	-	1	2	1
		Santiago Canyon	10	9	3	7
		OC Subtotal	11	10	6	9
		Supply Subtotal/Average	34	42	32	36
0614.30	Website Design and Development	LA Pierce	-	3	2	2
		Mt San Antonio	9	9	7	8
		Pasadena	-	-	1	0
		Santa Monica	-	-	2	1
		LA Subtotal	9	12	12	11
		Coastline	-	1	1	1
		Fullerton	-	3	-	1
		Irvine	2	3	-	2
		Orange Coast	-	-	9	3
		Saddleback	4	7	2	4
		Santa Ana	1	-	2	1

TOP Code	Program	College	2017-2018 Awards	2018-2019 Awards	2019-2020 Awards	3-Year Award Average
		Santiago Canyon	9	24	3	12
		OC Subtotal	16	38	17	24
	Supply Subtotal/Average		25	50	29	35
0614.50	Desktop Publishing	East LA	-	1	1	1
		LA Subtotal	-	1	1	1
		Fullerton	-	1	2	1
		Santa Ana	6	7	-	4
		OC Subtotal	6	8	2	5
	Supply Subtotal/Average		6	9	3	6
0614.60	Computer Graphics and Digital Imagery	Citrus	23	13	12	16
		East LA	-	16	1	6
		LA Subtotal	23	29	13	22
		Coastline	2	5	1	3
		Cypress	1	7	5	4
		Fullerton	1	2	1	1
		North Orange Adult	4	9	3	5
		Orange Coast	35	38	21	31
		Saddleback	7	4	4	5
		Santa Ana	3	-	11	5
		OC Subtotal	53	65	46	55
	Supply Subtotal/Average		76	94	59	76
0709.00	World Wide Web Administration	Glendale	9	6	7	7
		LA Pierce	5	9	-	5
		Long Beach	4	22	24	17
		West LA	24	13	9	15
		LA Subtotal	42	50	40	44
		Saddleback	-	-	2	1
		OC Subtotal	-	-	2	1
	Supply Subtotal/Average		42	50	42	45
0709.10	E-Commerce (Technology emphasis)	East LA	-	1	1	1
		LA Subtotal	-	1	1	1
		Saddleback	-	6	1	2
		OC Subtotal	-	6	1	2
	Supply Subtotal/Average		-	7	2	3

TOP Code	Program	College	2017- 2018 Awards	2018- 2019 Awards	2019- 2020 Awards	3-Year Award Average
0936.00	Printing and Lithography	Fullerton	4	3	-	2
		Saddleback	1	-	4	2
		OC Subtotal	5	3	4	4
Supply Subtotal/Average			5	3	4	4
1030.00	Graphic Art and Design	Cerritos	10	11	11	11
		East LA	10	18	3	10
		El Camino	2	-	1	1
		Glendale	9	6	4	6
		LA City	5	6	22	11
		LA Pierce	15	22	15	17
		LA Valley	3	2	5	3
		Long Beach	2	1	2	2
		Mt San Antonio	11	15	11	12
		Pasadena	7	9	7	8
		Rio Hondo	-	30	20	17
		Santa Monica	26	31	50	36
		LA Subtotal	100	151	151	134
		Fullerton	14	12	12	13
		Golden West	22	57	32	37
		Irvine	-	5	16	7
		Saddleback	15	23	15	18
		Santa Ana	1	4	3	3
		Santiago Canyon	9	5	1	5
		OC Subtotal	61	106	79	82
Supply Subtotal/Average			161	257	230	216
Supply Total/Average			381	554	431	455

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 middle-skill digital media occupations. Exhibit 4 shows the annual and three-year average number of awards conferred by these institutions in the related Classification of Instructional Programs (CIP) Codes: Digital Communication and Media/Multimedia (09.0702), Graphic Communications, General (10.0301), Animation, Interactive Technology, Video Graphics and Special Effects (10.0304), Web Page, Digital/Multimedia and Information Resources Design (11.0801), Computer Graphics (11.0803), Computer Software and Media Applications, Other (11.0899), Web/Multimedia Management and Webmaster (11.1004), Digital Arts (50.0102), Design and Visual Communications, General (50.0401), Graphic Design (50.0409), and E-

Commerce/Electronic Commerce (52.0208). 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 967 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
09.0702	Digital Communication and Media/Multimedia	CSU-Dominguez Hills	50	41	58	50
		Fremont College	1	1	1	1
		Los Angeles ORT College (CLOSED)	15	10	8	11
		Marymount California Univ.	-	-	3	1
		Vanguard University of Southern California	12	7	8	9
10.0301	Graphic Communications, General	CSU-Los Angeles	2	5	10	6
10.0304	Animation, Interactive Technology, Video Graphics and Special Effects	Art Center College of Design	28	9	18	18
		Gnomon	36	36	40	37
		Laguna College of Art and Design	22	11	37	23
		Los Angeles Film School	11	44	51	35
		Loyola Marymount Univ.	12	20	15	16
		Mt Sierra College	3	6	-	3
		New York Film Academy	28	14	19	20
11.0801	Web Page, Digital/Multimedia and Information Resources Design	DeVry University-CA	36	18	7	20
		University of Phoenix-CA	1	1	2	1
11.0803	Computer Graphics	ABC Adult School	-	5	4	3
		Los Angeles Pacific College	-	-	33	11
11.0899	Computer Software and Media Applications, Other	Art Center College of Design	7	8	12	9
		California Institute of the Arts	-	-	7	2
		Learnet Academy	41	14	-	18
11.1004	Web/Multimedia Management	ABCO Technology	12	17	24	18
		Pepperdine University	-	2	-	1
		University of Phoenix-CA	4	-	1	2

CIP Code	Program	College	2016-2017 Awards	2017-2018 Awards	2018-2019 Awards	3-Year Award Average
	and Webmaster					
50.0102	Digital Arts	Los Angeles Academy of Figurative Art	3	-	3	2
		Marymount California Univ.	12	17	15	15
		Otis College of Art and Design	63	92	69	75
		Univ. of Southern California	22	16	14	17
		Woodbury University	3	4	1	3
50.0401	Design and Visual Communications, General	Bethesda University	3	-	-	1
		Biola University	3	2	5	3
		Fashion Institute of Design & Merchandising-Los Angeles	181	155	142	159
		Gnomon	28	37	48	38
		Otis College of Art and Design	37	43	34	38
		Platt College-Los Angeles	-	5	-	2
		University of La Verne	1	-	-	0
50.0409	Graphic Design	Art Center College of Design	71	50	73	65
		California Institute of the Arts	11	11	9	10
		California State Polytechnic University-Pomona	123	128	92	114
		CSU-Dominguez Hills	-	1	-	0
		Chapman University	24	19	17	20
		Concordia University-Irvine	12	9	7	9
		Fashion Institute of Design & Merchandising-Los Angeles	44	36	38	39
		Laguna College of Art and Design	24	21	24	23
		Los Angeles Film School	-	-	3	1
		Los Angeles Pacific College	-	-	1	0
		Mt Sierra College	15	10	-	8
		New York Film Academy	-	3	3	2
		Otis College of Art and Design	-	-	1	0
		Platt College-Los Angeles	7	3	-	3

CIP Code	Program	College	2016-2017 Awards	2017-2018 Awards	2018-2019 Awards	3-Year Award Average
		University of La Verne	1	-	-	0
52.0208	E-Commerce/ Electronic Commerce	University of La Verne	-	2	3	2
Supply Total/Average			1,009	933	960	967

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)
Web Developers and Digital Interface Designers (15-1257)	9,302	9,693	391	4%	718	\$22.19	\$33.19	\$46.52
Special Effects Artists and Animators (27-1014)	8,301	8,322	21	0%	840	\$20.99	\$37.56	\$58.46
Graphic Designers (27-1024)	18,070	17,288	(782)	(4%)	1,510	\$19.10	\$27.58	\$37.51
Prepress Technicians and Workers (51-5111)	2,086	1,601	(485)	(23%)	207	\$15.29	\$19.38	\$24.06
Total	37,759	36,904	(855)	(2%)	3,274			

Exhibit 5. Los Angeles County

Occupation (SOC)	2019 Jobs	2024 Jobs	5-Yr Change	5-Yr % Change	Annual Openings	Entry-Level Hourly Earnings (25th Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75th Percentile)
Web Developers and Digital Interface Designers (15-1257)	6,700	6,999	299	4%	519	\$22.53	\$33.68	\$47.16
Special Effects Artists and Animators (27-1014)	7,516	7,536	20	0%	762	\$21.90	\$38.37	\$59.30
Graphic Designers (27-1024)	13,738	13,110	(628)	(5%)	1,146	\$19.16	\$27.72	\$37.73
Prepress Technicians and Workers (51-5111)	1,382	1,026	(356)	(26%)	135	\$15.26	\$19.33	\$23.98
Total	29,337	28,671	(665)	(2%)	2,563			

Exhibit 6. Los Angeles and Orange Counties

Occupation (SOC)	2019 Jobs	2024 Jobs	5-Yr Change	5-Yr % Change	Annual Openings
Web Developers and Digital Interface Designers (15-1257)	9,302	9,693	391	4%	718
Special Effects Artists and Animators (27-1014)	8,301	8,322	21	0%	840
Graphic Designers (27-1024)	18,070	17,288	(782)	(4%)	1,510
Prepress Technicians and Workers (51-5111)	2,086	1,601	(485)	(23%)	207
Total	37,759	36,904	(855)	(2%)	3,274

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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