

## Program Endorsement Brief: 0949.00/Automotive Collision Repair

### Automotive Collision Repair

Orange County Center of Excellence, April 2022

#### Summary Analysis

<b>Program Endorsement:</b>	<b>Endorsed:</b> All Criteria Met <input type="checkbox"/>	<b>Endorsed:</b> Some Criteria Met <input checked="" type="checkbox"/>	<b>Not</b> Endorsed <input type="checkbox"/>
<b>Program Endorsement Criteria</b>			
<b>Supply Gap:</b>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
<b>Living Wage:</b> (Entry-Level, 25 <sup>th</sup> )	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	
<b>Education:</b>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
<b>Emerging Occupation(s)</b>			
	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 two middle-skill occupations: *insurance appraisers, auto damage* (13-1032) and *automotive body and related repairers* (49-3021), and two below middle-skill occupations: *automotive glass installers and repairers* (49-3022) and *coating, painting, and spraying machine setters, operators, and tenders* (51-9124). Middle-skill occupations typically require some postsecondary education, but less than a bachelor's degree.<sup>1</sup> 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.

Although the occupations *automotive glass installers and repairers* as well as *coating, painting, and spraying machine setters, operators, and tenders* are considered below middle-skill, they are included in this report because they align with the knowledge, skills, and abilities that can be obtained through completion of this proposed program. However, the labor market endorsement in this report is based solely on data related to the middle-skill group of occupations.

Based on the available data there appears to be a supply gap for these middle-skill Automotive Collision Repair occupations in the region. Furthermore, while the majority of annual openings for the middle-skill occupations in this report typically require a high school diploma or equivalent, between 27.4% and 34.7% of workers in the field have completed some college or an associate degree as their highest level of education. However, the majority of job openings have entry-level wages that are lower than 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:

<sup>1</sup> 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.

**Demand:**

- **Supply Gap Criteria** – Over the next five years, there is projected to be **469 middle-skill jobs available annually** in the region due to retirements and workers leaving the field, **which is more than the 187 awards conferred annually** by educational institutions in the region.
- **Living Wage Criteria:** Within Orange County, **the majority (85%) of annual job openings** for these middle-skill Automotive Collision Repair occupations have **entry-level wages below the county’s living wage (\$20.63/hour).**<sup>2</sup>
  - However, **median wages** for these middle-skill Automotive Collision Repair occupations in **Orange County are above the living wage estimate.**
- **Educational Criteria:** Within the LA/OC region, **85% of the annual middle-skill job openings** for occupations related to Automotive Collision Repair **typically require a high school diploma or equivalent.**
  - However, the national-level educational attainment data indicates **between 27.4% and 34.7% of workers in the field have completed some college or an associate degree** as their highest level of education.

**Supply:**

- There are **six community colleges** in the LA/OC region that issue awards related to Automotive Collision Repair, conferring an average of **97 awards annually** between 2017 and 2020.
- Between 2016 and 2019, there was an average of **90 awards conferred annually** in related training programs by non-community college institutions, all of which were generated by **one non-community college institution throughout** the region.

**Occupational Demand**

Exhibit 1 shows the five-year occupational demand projections for the group of middle-skill Automotive Collision Repair occupations. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to decrease by 8% through 2025. However, there will be nearly 470 job openings per year through 2025 due to retirements and workers leaving the field.

**Exhibit 1: Middle-skill occupational demand in Los Angeles and Orange Counties<sup>3</sup>**

Geography	2020 Jobs	2025 Jobs	2020-2025 Change	2020-2025 % Change	Annual Openings
Los Angeles	3,926	3,625	(301)	(8%)	339
Orange	1,533	1,379	(154)	(10%)	130
<b>Total</b>	<b>5,459</b>	<b>5,004</b>	<b>(455)</b>	<b>(8%)</b>	<b>469</b>

<sup>2</sup> Living wage data was pulled from California Family Needs Calculator on 4/10/2022. For more information, visit the California Family Needs Calculator website: <https://insightcced.org/family-needs-calculator/>.

<sup>3</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.

Exhibit 2 shows the five-year occupational demand projections for the group of below middle-skill Automotive Collision Repair occupations. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to decrease by 8% through 2025. However, there will be nearly 600 job openings per year through 2025 due to retirements and workers leaving the field.

**Exhibit 1: Middle-skill occupational demand in Los Angeles and Orange Counties<sup>4</sup>**

Geography	2020 Jobs	2025 Jobs	2020-2025 Change	2020-2025 % Change	Annual Openings
Los Angeles	4,408	4,047	(361)	(8%)	425
Orange	1,792	1,686	(106)	(6%)	174
<b>Total</b>	<b>6,200</b>	<b>5,733</b>	<b>(467)</b>	<b>(8%)</b>	<b>599</b>

### Wages

The labor market endorsement in this report considers the entry-level hourly wages for these Automotive Collision Repair 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 the group of middle-skill Automotive Collision Repair occupations have entry-level wages below the living wage for one adult (\$20.63 in Orange County). Typical entry-level hourly wages are in a range between \$15.99 and \$26.18. Experienced workers can expect to earn wages between \$34.58 and \$40.31, which are higher than the living wage estimate. Orange County’s average wages are below the average statewide wage of \$26.95 for these occupations.

All annual openings for the group of below middle-skill Automotive Collision Repair occupations have entry-level wages below the living wage for one adult (\$20.63 in Orange County). Typical entry-level hourly wages are in a range between \$14.17 and \$15.41. Additionally, *automotive glass installers and repairers* has entry-level wages below California’s current minimum wage (\$14.00/hour for employers with 25 employees or less; \$15.00/hour for employers with 26 or more employees).<sup>5</sup> Experienced workers can expect to earn wages between \$23.67 and \$23.69, which are higher than the living wage estimate. Orange County’s average wages are below the average statewide wage of \$21.34 for these occupations.

**Los Angeles County:** The majority (91%) of annual openings for the group of middle-skill Automotive Collision Repair occupations have entry-level wages below the living wage for one adult (\$18.10 in Los Angeles County). Typical entry-level hourly wages are in a range between \$14.23 and \$26.53. Additionally, *automotive body and related repairers* has entry-level hourly wages that are lower than California’s current minimum wage (\$14.00/hour for employers with 25 employees or less; \$15.00/hour for employers with 26 or more employees). Experienced

<sup>4</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.

<sup>5</sup> Wage data is based on data collected over the previous three years. This historical data is a “point-in-time” estimate and does not reflect recent changes in minimum wage laws. For more information regarding current minimum wage laws, see: [https://www.dir.ca.gov/dlse/FAQ\\_MinimumWage.htm](https://www.dir.ca.gov/dlse/FAQ_MinimumWage.htm)

workers can expect to earn wages between \$30.97 and \$41.05, which are higher than the living wage estimate. Los Angeles County's average wages are below the average statewide wage of \$26.95 for these occupations.

All annual openings for the group of below middle-skill Automotive Collision Repair occupations have entry-level wages below the living wage for one adult (\$18.10 in Los Angeles County) and California's current minimum wage (\$14.00/hour for employers with 25 employees or less; \$15.00/hour for employers with 26 or more employees). Typical entry-level hourly wages are in a range between \$12.57 and \$14.76. Experienced workers can expect to earn wages between \$21.12 and \$22.90, which are higher than the living wage estimate. Los Angeles County's average wages are below the average statewide wage of \$21.34 for these occupations.

### **Job Postings**

There were 2,650 online job postings related to the group of middle-skill Automotive Collision Repair occupations listed in the past 12 months. The highest number of job postings were for auto body technicians, collision estimators, body technicians, auto body collision technicians, and collision technicians. The top skills were repair, auto repair, customer service, estimating, and welding. The top three employers, by number of job postings, in the region were Caliber Collision, Service King, and AutoNation.

There were 387 online job postings related to the group of below middle-skill Automotive Collision Repair occupations listed in the past 12 months. The highest number of job postings were for auto glass technician trainees, window tinters, paint preppers, industrial painters, and paint technicians. The top skills were painting, repair, personal protective equipment (PPE), cleaning, and automotive painting. The top three employers, by number of job postings, in the region were Safelite AutoGlass, Northrup Grumman, and Tesla

### **Educational Attainment**

The Bureau of Labor Statistics (BLS) lists a postsecondary nondegree award as the typical entry-level education for *insurance appraisers, auto damage* and a high school diploma or equivalent as the typical entry-level education for *automotive body and related repair workers*. In the LA/OC region, the majority of annual middle-skill job openings (89%) typically require a high school diploma or equivalent. However, the national-level educational attainment data indicates between 27.4% and 34.7% of workers in the field have completed some college or an associate degree as their highest level of education. Of the 12% of middle-skill Automotive Collision Repair job postings listing a minimum education requirement in Los Angeles/Orange County, 92% (437) requested high school or vocational training 1% (6) requested an associate degree, and 7% (34) requested a bachelor's degree.

The Bureau of Labor Statistics (BLS) lists a high school diploma as the typical entry-level education for the group of below middle-skill Automotive Collision Repair occupations. Furthermore, the national-level educational attainment data indicates less than one-third of workers in the field have completed some college or an associate degree as their highest level of education. Of the 34% of below middle-skill Automotive Collision job postings listing a minimum education requirement in Los Angeles/Orange County, 98.5% (128) requested high school or vocational training 0.75% (1) requested an associate degree, and 0.75% (1) requested a bachelor's degree.

**Educational Supply**

**Community College Supply**—Exhibit 2 shows the three-year average number of awards conferred by community colleges in the related TOP code: Automotive Collision Repair (0949.00). The colleges with the most completions in the region are: Cypress and El Camino. Over the past 12 months, there were no 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
0949.00	Automotive Collision Repair	Cerritos	21	15	19	18
		Compton	7	8	-	5
		El Camino	10	33	34	26
		LA Trade	32	9	16	19
		Rio Hondo	-	1	-	0
		<b>LA Subtotal</b>	<b>70</b>	<b>66</b>	<b>69</b>	<b>68</b>
		Cypress	22	41	24	29
		<b>OC Subtotal</b>	<b>22</b>	<b>41</b>	<b>24</b>	<b>29</b>
<b>Supply Total/Average</b>			<b>92</b>	<b>107</b>	<b>93</b>	<b>97</b>

**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 Automotive Collision Repair. Exhibit 3 shows the annual and three-year average number of awards conferred by one institution in the related Classification of Instructional Programs (CIP) Code: Autobody/Collision and Repair Technology/Technician (47.0603). Due to different data collection periods, the most recent three-year period of available data is from 2016 to 2019. Between 2016 and 2019, non-community college institutions in the region conferred an average of 90 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
47.0603	Autobody/Collision and Repair Technology/Technician	Universal Technical Institute-Southern California	65	106	98	90
<b>Supply Total/Average</b>			<b>65</b>	<b>106</b>	<b>98</b>	<b>90</b>

Appendix A: Occupational demand and wage data by county

Exhibit 4. Orange County

Occupation (SOC)	2020 Jobs	2025 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)
Insurance Appraisers, Auto Damage (13-1032)	265	236	(30)	(11%)	20	\$26.18	\$32.44	\$40.31
Automotive Body and Related Repairers (49-3021)	1,268	1,143	(125)	(10%)	110	\$15.99	\$23.86	\$34.58
<b>Middle-Skill Total</b>	<b>1,533</b>	<b>1,379</b>	<b>(154)</b>	<b>(10%)</b>	<b>130</b>			
Automotive Glass Installers and Repairers (49-3022)	396	337	(60)	(15%)	38	\$14.17	\$18.62	\$23.69
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders (51-9124)	1,396	1,350	(46)	(3%)	136	\$15.41	\$18.86	\$23.67
<b>Below Middle-Skill Total</b>	<b>1,792</b>	<b>1,686</b>	<b>(106)</b>	<b>(6%)</b>	<b>174</b>			
<b>Total</b>	<b>3,325</b>	<b>3,065</b>	<b>(260)</b>	<b>(8%)</b>	<b>304</b>			

Exhibit 5. Los Angeles County

Occupation (SOC)	2020 Jobs	2025 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)
Insurance Appraisers, Auto Damage (13-1032)	424	377	(47)	(11%)	32	\$26.53	\$32.97	\$41.05
Automotive Body and Related Repairers (49-3021)	3,502	3,249	(253)	(7%)	308	\$14.23	\$21.02	\$30.97
<b>Middle-Skill Total</b>	<b>3,926</b>	<b>3,625</b>	<b>(301)</b>	<b>(8%)</b>	<b>339</b>			

Occupation (SOC)	2020 Jobs	2025 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)
Automotive Glass Installers and Repairers (49-3022)	1,048	937	(110)	(11%)	103	\$12.57	\$16.59	\$21.12
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders (51-9124)	3,361	3,110	(251)	(7%)	322	\$14.76	\$18.12	\$22.90
<b>Below Middle-Skill Total</b>	<b>4,408</b>	<b>4,047</b>	<b>(361)</b>	<b>(8%)</b>	<b>425</b>			
<b>Total</b>	<b>8,334</b>	<b>7,672</b>	<b>(662)</b>	<b>(8%)</b>	<b>764</b>			

#### Exhibit 6. Los Angeles and Orange Counties

Occupation (SOC)	2020 Jobs	2025 Jobs	5-Yr Change	5-Yr % Change	Annual Openings
Insurance Appraisers, Auto Damage (13-1032)	689	612	(77)	(11%)	51
Automotive Body and Related Repairers (49-3021)	4,770	4,392	(378)	(8%)	418
<b>Middle-Skill Total</b>	<b>5,459</b>	<b>5,004</b>	<b>(455)</b>	<b>(8%)</b>	<b>469</b>
Automotive Glass Installers and Repairers (49-3022)	1,444	1,274	(170)	(12%)	142
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders (51-9124)	4,757	4,459	(297)	(6%)	458
<b>Below Middle-Skill Total</b>	<b>6,200</b>	<b>5,733</b>	<b>(467)</b>	<b>(8%)</b>	<b>599</b>
<b>Total</b>	<b>11,660</b>	<b>10,738</b>	<b>(922)</b>	<b>(8%)</b>	<b>1,069</b>

## 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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