OTIS COLLEGE OF ART AND DESIGN

OTIS REPORT ON THE CREATIVE ECONOMY 2017

LOS ANGELES REGION

LAEDC

Prepared for Otis College of Art and Design by the Los Angeles County Economic Development Corporation.

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OTIS REPORT ON THE CREATIVE ECONOMY 2017

2017 OTIS REPORT
on the Creative Economy of the LOS ANGELES REGION

May 2017

LAEDC

Prepared for Otis College of Art and Design by the
INSTITUTE FOR APPLIED ECONOMICS
Los Angeles County Economic Development Corporation

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ABOUT THE KYSER CENTER FOR ECONOMIC RESEARCH

The LAEDC Institute for Applied Economics specializes in objective and unbiased economic and public policy research in order to foster informed decision-making and guide strategic planning. In addition to commissioned research and analysis, the Institute conducts foundational research to ensure LAEDC's many programs for economic development are on target. The Institute focuses on economic impact studies, regional industry and cluster analysis and issue studies, particularly in workforce development and labor market analysis. Every reasonable effort has been made to ensure that the data contained herein reflect the most accurate and timely information possible and they are believed to be reliable. The report is provided solely for informational purposes and is not to be construed as providing advice, recommendations, endorsements, representations or warranties of any kind whatsoever.

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ABOUT OTIS COLLEGE OF ART AND DESIGN

Established in 1918, Otis College of Art and Design offers undergraduate and graduate degrees in a wide variety of visual and applied arts, media, and design. Core programs in liberal arts, business practices, and community-driven projects support the College's mission to prepare diverse students to enrich our world through their creativity, skill, and vision. The renowned Creative Action program has been recognized by the Carnegie Foundation for Community Engagement, and the *Otis Report on the Creative Economy* is a powerful advocacy tool for creative industries. The College serves the Greater Los Angeles Area through compelling public programming, as well as year-round Continuing Education courses for all ages. More information is available at www.otis.edu.

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Los Angeles County Economic Development Corporation

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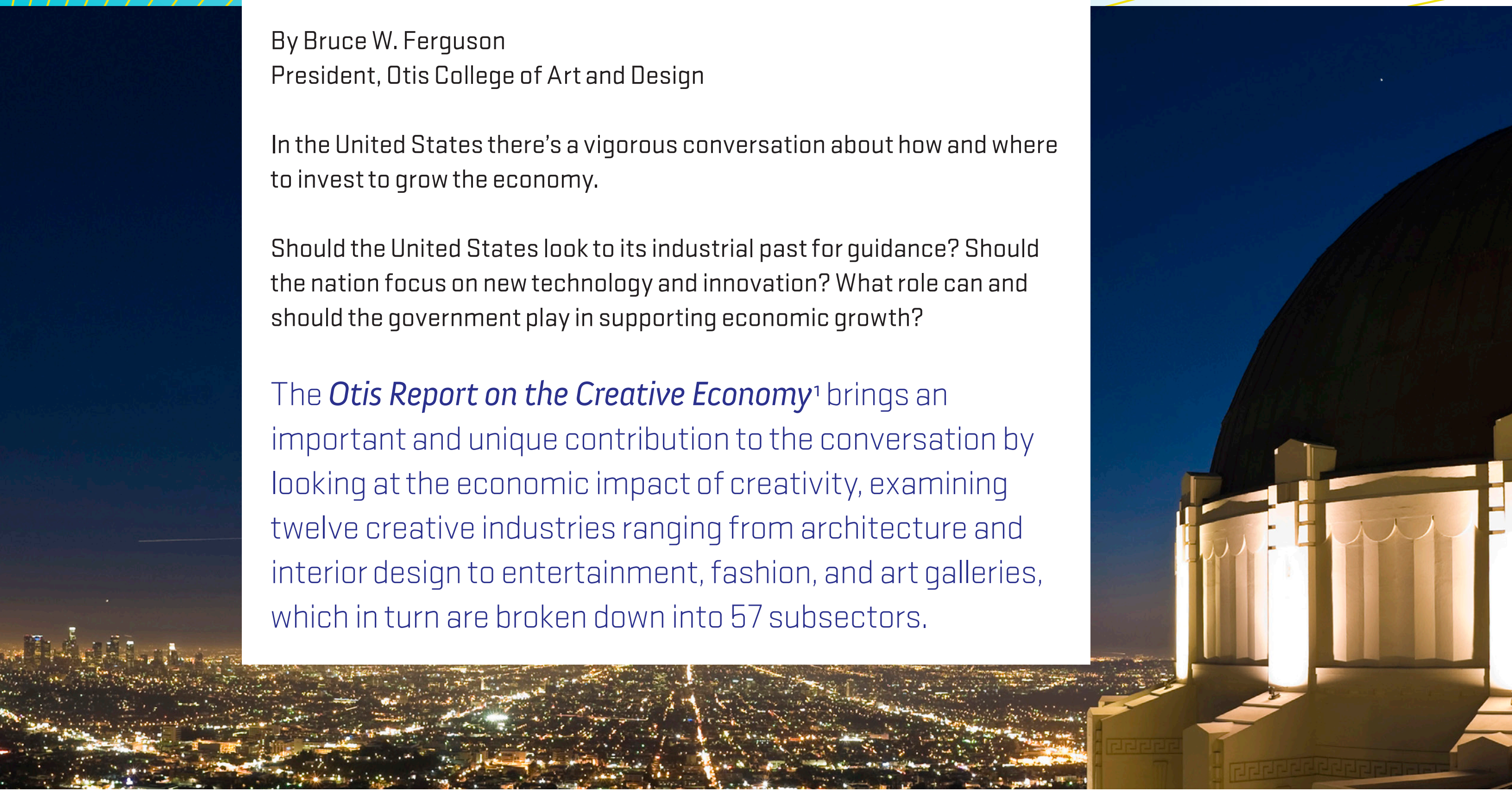
NOW, MORE THAN EVER.

By Bruce W. Ferguson
President, Otis College of Art and Design



In the United States there's a vigorous conversation about how and where to invest to grow the economy.

Should the United States look to its industrial past for guidance? Should the nation focus on new technology and innovation? What role can and should the government play in supporting economic growth?

The ***Otis Report on the Creative Economy***[1] brings an important and unique contribution to the conversation by looking at the economic impact of creativity, examining twelve creative industries ranging from architecture and interior design to entertainment, fashion, and art galleries, which in turn are broken down into 57 subsectors.

The report looks squarely at the Los Angles Region, which includes Los Angeles and Orange Counties. It looks not only at a set of industries rarely brought to the conversation of economic impact but it looks at its importance within one of the world's largest economies. California's economy grew by 4.1 percent in 2015 (while the nation's GDP grew 2.4 percent) and currently ranks as the sixth largest in the world.

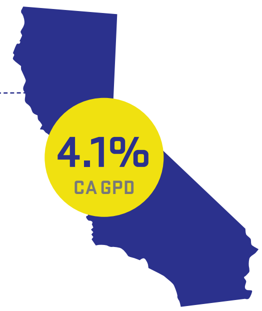
Here are a few highlights about the Los Angeles Region's creative economy from the 2017 Otis Report:

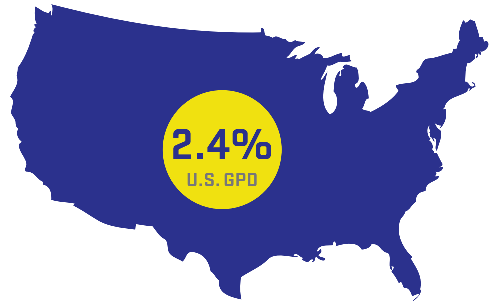
- Creative economy output totaled $190.3 billion (direct, indirect, and induced).
- The creative economy generated 759,000 (direct, indirect, and induced), and those wage and salary workers earned $56.9 billion in total labor income.
- One in eight (or 15 percent) of all private wage and salary workers in the L.A. Region work directly or indirectly in the creative industries.
- Property taxes, state and local personal income taxes, and sales taxes directly and indirectly generated by the creative industries totaled $8.2 billion across the L.A. Region.

SCALE OF CALIFORNIA ECONOMY IN 2015

6th
LARGEST ECONOMY IN THE WORLD

CALIFORNIA GDP OUTPACES U.S. GDP IN 2015





HIGHLIGHTS ABOUT THE LOS ANGELES REGION'S CREATIVE ECONOMY FROM THE 2017 OTIS REPORT:

TOTAL CREATIVE ECONOMY OUTPUT - 2015

$190.3 Billion

CREATIVE INDUSTRY EMPLOYMENT - 2015

759,000 Jobs

(DIRECT, INDIRECT, AND INDUCED)

WAGES EARNED - 2015

$56.9 Billion

IN TOTAL LABOR INCOME (DIRECT, INDIRECT, AND INDUCED)

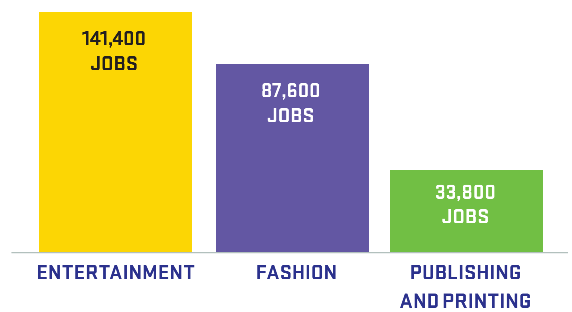
Wage and salary workers earned $56.9 billion in total labor income.

CREATIVE INDUSTRIES WORKERS - 2015

1 in 8

Total creative industries workers as a share of all private wage and salary workers

TOP JOB COUNTS BY SECTOR - LOS ANGELES COUNTY - 2015



The largest employment counts in Los Angeles County's creative sectors were in entertainment (141,400 jobs), fashion (87,600 jobs), and publishing and printing (33,800 jobs), accounting for 70 percent of wage and salary employment in the creative industries.

TAX REVENUES - (DIRECT, INDIRECT, AND INDUCED) - 2015

$8.2 Billion

Property taxes, state and local personal income taxes, and sales taxes directly and indirectly generated by the creative industries totaled $16.7 billion across all of California.

CREATIVE OCCUPATIONS REQUIRING AT LEAST A BA

NEARLY

50%

Creative occupations often require high levels of education or skills training, with close to 50 percent of those examined requiring a bachelor's degree or higher.

THIS GROWTH IS AGAINST THE BACKDROP OF A GLOBAL SURGE IN ECONOMIES CONNECTED TO ART AND DESIGN.

- The largest employment counts in Los Angeles County's creative sectors were in entertainment (141,400 jobs), fashion (87,600 jobs), and publishing and printing (33,800 jobs), accounting for 70 percent of wage and salary employment in the creative industries.
- Creative occupations often require high levels of education or skills training, with close to 50 percent of those examined requiring a bachelor's degree or higher.

This growth is against the backdrop of a global surge in economies connected to art and design.

The global economy in the art market has hovered between $50 and $60 billion in the past decade, of which 40 percent was generated in the United States in 2016.[2] The expansion of galleries, museums, and auctions and sales in Los Angeles supports the argument that the art market is adding employment in California through industries that support the art trade, exhibitions, and events.

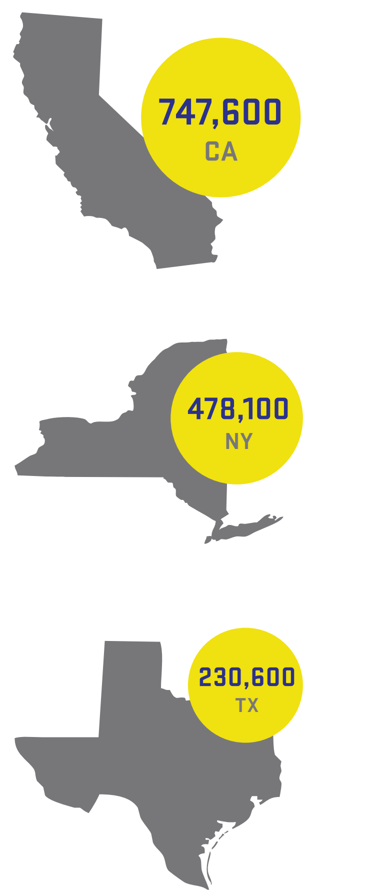
CALIFORNIA LEADS THE NATION

This year's Otis Report on the state of California includes a comparison of the number of wage and salary workers in the creative industries in California and the rest of the nation. With 747,600 jobs, California far surpasses New York State, which has 478,100 jobs, followed by Texas at 230,600 jobs.

This report provides information on location quotients (LQ), which are used to quantify the concentration of a particular industry, industry cluster, occupation, or demographic group in a region compared to the nation. It reveals what makes a region unique and gives an indication of where a region has a competitive advantage. In Los Angeles County, the ten occupations with the highest LQs were all in creative occupations. Orange County's profile was different where only one of the top ten occupations by LQ was creative: Landscape Architecture. The L.A. Region has a higher concentration of creative occupations than the nation as a whole. These include actors, artists' agents, fabric and apparel patternmakers, film and video editors, makeup artists, and media and communications workers.

The Otis Report demonstrates that creativity and innovation thrives in Los Angeles and throughout the state of California. New businesses, motion picture and television studios, restaurants, museums, start-ups, and tech hubs show how the creative economy is intimately tied to the health and well-being of our citizens and communities.

STATES WITH MOST CREATIVE JOBS



THE STATE OF CREATIVITY

In a postindustrial society, activities based on creativity are an essential feature of a flourishing economy, and the data in the Otis Report leaves no doubt that creativity is one of Southern Californa's most important economic assets. When one sees the data, a persuasive case for the beneficial and essential role that creative enterprise plays in the lives of Southern Californians becomes clear. It is my hope that cities and counties throughout the region can leverage the Otis Report to encourage further investments in arts education, economic development, and cultural planning.

Just this spring Culver City, which is home to Otis College's MFA graduate studios, released its own creative economy report to document that city's share of the creative growth in Los Angeles County. The report, produced in partnership with the LAEDC, includes testimonials by people across that city who understand the importance of the creative economy or have helped its growth in Culver City as well as objective statistics to verify their assertions.

It is critical that leaders from the public, private, and nonprofit sectors work together to support this type of examination in order for the larger creative economy to continue to flourish and thrive.

THE ACKNOWLEDGMENTS

On behalf of Otis College of Art and Design, I would like to express thanks to the Kyser Center for Economic Research at the Los Angeles County Economic Development Corporation for generating both the Los Angeles Regional Report and the California Report.

The *2017 Otis Report on the Creative Economy* of the Los Angeles Region would not have been possible without the generous support of individuals and organizations that have joined together to affirm the value of the creative economy.

I would also like to thank our report sponsors for their incredible generosity. The **California Arts Council** has been an invaluable partner on this project, providing lead sponsorship of the California report and exclusive sponsorship of the addendum on artist housing. Additional support was provided by **City National Bank, City of Los Angeles Department of Cultural Affairs, DPR Construction, Arthur J. Gallagher & Co., Marsh, Mattel, Moss Adams, SignCentrix, Sony Pictures,** and **Alan Zafran,** and our media partners, Arts for LA, Arts Orange County, Californians for the Arts, and the LAX Coastal Chamber of Commerce has enabled this conversation to evolve and grow, bringing stakeholders together to advance art and culture in their communities.

Bruce W. Ferguson
President
Otis College of Art and Design

1
The 2017 Otis Report on the Creative Economy of California is available for download at www.otis.edu/otis-report-creative-economy.

2
The Art Market 2017 by Dr. Clare McAndrew (Art Basel and UBS) is available at www.artbasel.com/about/initiatives/the-art-market)

1

EXECUTIVE SUMMARY

INTRODUCTION

In the 19th century, the Industrial Revolution reshaped American society. Innovations like the steam engine, the sewing machine, and the telegraph transformed manufacturing and communications. As industry mechanized, demand for factory labor increased dramatically, prompting millions of workers to leave farms and small towns in rural America to try their fortunes in the nation's rapidly expanding cities. This mass internal migration changed not only how and where Americans worked, but also how they lived. The rise of the postindustrial economy in the late 20th century may mark an equally fundamental shift in American society. Innovation, and with it human capital and creativity, have become crucial drivers of economic growth, leading to new ways of thinking about how and where people live and work.

> "Creativity is not new and neither is economics, but what is new is the nature of the relationship between them and how they combine to create extraordinary value and wealth."
>
> –John Howkins (2002)

While creativity and new ideas can occur anywhere, a handful of the largest metropolitan regions in the U.S. have become the nation's innovation hubs. Examples include technology in the San Francisco Bay Area, biotechnology in San Diego and Boston, and aircraft production and design in Seattle. The Los Angeles region is widely known for its entertainment industry. While entertainment is still a large, important part of the Los Angeles creative economy, the region's creative profile extends far beyond its movie studios. The purpose of this report is to explore the creative economy in Los Angeles and Orange counties in all its diversity, and to put real numbers to the business of creativity.

WHAT THE NUMBER SAY

The creative industries of the Los Angeles region (defined as Los Angeles and Orange counties) turned out another solid performance in 2015 in terms of employment, labor income, and output. Over the five-year period covered in this report (2010 to 2015), direct wage and salary employment[3] in the region's creative industries increased by 31,700 jobs to 429,400, an increase of 7.9 percent.

Based on the creative industries as defined in this report, the Los Angeles metropolitan area was home to the second largest number of creative wage and salary workers (429,400) in the nation. The New York metropolitan area with its larger employment base came in first with 489,500 workers. Rounding out the top five metro areas were the Bay Area (193,200 workers), Chicago-Naperville-Elgin (138,100), and Seattle-Tacoma-Bellevue (106,800).

Although the New York metropolitan area had a higher absolute number of workers in the creative industries, creative employment in the Los Angeles region accounted a greater share of total wage and salary jobs, 8.6 percent in the Los Angeles MSA versus 6.4 percent in the New York MSA.

Total labor income in the creative industries of the Los Angeles region amounted to $38.8 billion in 2015 or 13.2 percent of annual private sector wage and salary payrolls in the region. The entertainment sector contributed $15.8 billion or 40 percent of total annual creative sector payrolls, followed by the visual and performing arts at $6.2 billion and fashion at $4.4 billion.

In addition to wage and salary employment, growth in the creative industries is also driven by talented self-employed individuals. In 2014 (the latest year for which data is available), there were almost 175,000 self-employed persons working in the creative industries of the Los Angeles region earning revenues of $8.3 billion. Between 2009 and 2014, the number of self-employed workers in Los Angeles and Orange counties increased at an annual average rate of 4.1 percent (31,641 firms in total), outpacing the region's 3.1 percent increase in self-employment across all industries.

While direct job counts in the creative industries in the Los Angeles region were notable, they were just one part of a much larger employment effect. Direct employees are those who work for a firm in one of the designated creative industries. Indirect jobs are created when firms in these industries make purchases from their suppliers and vendors. Additional induced jobs are generated when direct and indirect workers spend their wages on consumer goods and services. This means that every job within the creative industries supports or sustains a number of other jobs in the region that are outside the creative sector. Direct, indirect, and induced employment in the creative industries of the Los Angeles region totaled 759,000 jobs in 2015, up from 744,100 in 2014. The labor income earned by these workers was $56.9 billion.

Activity in the creative sector triggers not only jobs and spending, but it also generates tax revenues for state and local government that help fund local services like education and public safety. Property taxes, state and local personal income taxes, and sales taxes generated directly and indirectly by the creative industries totaled $8.2 billion across the region in 2015.

The creative industries of Los Angeles and Orange counties also generated $190.3 billion in economic output. Of that, $117.4 billion was value-added (corporate profits and labor income). This net economic contribution was the equivalent of 13.7 percent of the region's gross product ($855.4 billion) in 2015, up from a share of 12.7 percent in 2014, an indication that the contribution of the creative industries to the regional economy is growing.

As long as the national economy continues to expand, growth is also expected to continue in the Los Angeles region. The Los Angeles County Economic Development Corporation (LAEDC) projects that employment growth in the creative industries of Los Angeles County will increase by 5.1 percent over the next five years, bringing the total up to 389,800 by 2020 with the addition of 18,900 jobs. In Orange County, creative industry employment is expected to increase by 5.8 percent from 53,700 jobs to 56,800 over the same period.[4]

The creative industries make a significant contribution to employment and economic growth in the Los Angeles region. They also foster innovation and encourage spillover effects that create opportunities in other industries. The region's creative industries help move the economy forward by attracting investment, tourism, and consumer spending, and by generating tax revenues.

3
Wage and salary employment refers to workers on a firm's payroll as opposed to workers who are self-employed.

4
Employment projections do not include fine and performing arts schools.

HIGHLIGHTS ABOUT LOS ANGELES REGION'S CREATIVE ECONOMY

TOTAL ECONOMIC OUTPUT - LOS ANGELES REGION - 2015

$190.3 Billion

Overall contribution to regional economy

NET ECONOMIC CONTRIBUTION - LOS ANGELES REGION-2015

13.7%

OF THE REGION'S GROSS PRODUCT ($855.4 BILLION) IN 2015

WAGES EARNED- LOS ANGELES REGION - 2015

$56.9 Billion

TOTAL LABOR INCOME (DIRECT, INDIRECT, AND INDUCED)

TAX REVENUE - LOS ANGELES REGION - 2015

$8.2 Billion

(DIRECT, INDIRECT, AND INDUCED)

EMPLOYMENT - LOS ANGELES REGION - 2015

759,000 Jobs

(DIRECT, INDIRECT, AND INDUCED)

EMPLOYMENT - LOS ANGELES REGION - 2015

1 in 8

Total creative industries workers as a share of all private wage and salary workers

CREATIVE ECONOMY EMPLOYMENT - LOS ANGELES REGION

429,400 Jobs

(DIRECT)

2010 – 2015 EMPLOYMENT GROWTH - LOS ANGELES REGION

+7.9%

Direct wage and salary employment in the region's creative industries increased by 31,700 jobs to 429,400 or 7.9 percent.

2015 – 2020 GROWTH - LOS ANGELES COUNTY

+5.1 %

CREATIVE INDUSTRY EMPLOYMENT GROWTH

2015 – 2020 GROWTH - ORANGE COUNTY

+5.8 %

CREATIVE INDUSTRY EMPLOYMENT GROWTH

EXHIBIT ES-1

2017 CREATIVE ECONOMY REPORT NUMBERS AT A GLANCE

2015 EMPLOYMENT	Los Angeles County	Orange County	LA/OC Region
Direct jobs	374,500	54,900	429,400
Direct creative industries workers as a share of all private wage and salary workers	10.1%	4.0%	8.4%
Total jobs – direct, indirect, and induced	665,800	93,100	759,000
Total creative industries workers as a share of all private wage and salary workers	18.0%	6.8%	15.0%

2015 LABOR INCOME	Los Angeles County	Orange County	LA/OC Region
Direct labor income ($ billions)	35.0	3.8	38.8
Total labor income – direct, indirect, and induced ($ billions)	51.3	5.6	56.9

2015 OUTPUT	Los Angeles County	Orange County	LA/OC Region
Total creative industries output ($ billions)	170.7	19.6	190.3
Creative industries value-added ($ billions)	107.5	9.9	117.4
Total county gross product ($ billions)	627.2	228.2	855.4
Creative industries value-added as share of county gross product	17.1%	4.3%	13.7%

2015 TAXES	Los Angeles County	Orange County	LA/OC Region
State and local taxes ($ billions)	7.4	0.8	8.2

2014 SELF-EMPLOYMENT	Los Angeles County	Orange County	LA/OC Region
Number of self-employed	149,457	25,533	174,990
Self-employment receipts ($ billions)	7.3	1.0	8.3

Sources: Bureau of Labor Statistics, Bureau of Economic Analysis, IHS Global Insight, estimates by LAEDC IAE

WHAT IS THE CREATIVE ECONOMY?

As the creative economy expands to encompass innovative new activities and industries, its definition continues to evolve. Although often used interchangeably, there is a distinction between the creative economy and the creative industries. The creative economy comprises many creative activities whether expressed as art or innovation. The creative economy is largely made up of the creative industries – a designated set of industries that depend upon individual creativity to generate employment and wealth.

The creative industries that will be explored in the following pages include the following:

These 12 "super sectors" are further broken down into 57 subsectors.

What unifies this dissimilar set of industries is the fact that they all trade creative assets in the form of intellectual property – the medium through which creativity is transformed into something of economic value. Within these industries, we find the intersection of art, culture, business, and technology.

In addition to the industries designated as "creative," the creative economy of the Los Angeles region also includes organizations that provide a venue for artists to share their work with the public such as museums, art galleries, and theaters. The creative economy must also include a system that teaches, nurtures, and sustains creative activity: arts programs in K–12 schools and postsecondary arts institutions that develop talent, skills, and training. The long-term vitality of the creative economy also depends on philanthropic foundations and other nonprofit organizations to provide financial resources, incentives, and services to the creative community.

There are several ways to measure the size and economic contribution of the creative economy to the Los Angeles region. In this report, employment, wages, and output are the primary indicators. The value of intellectual property is also an important indicator but measuring intangibles such as ideas, design, brands, and style is challenging and beyond the scope of this report.

Creativity and the innovations that flow from creative activity are two of the Los Angeles region's foremost economic assets. The talent that drives the creative economy provides a competitive advantage that reaches across almost every industry in the Los Angeles region. Creativity builds brand awareness and attracts talented people to a dynamic environment. Arts and cultural amenities also attract tourism dollars, an important component of the regional economy. Cultural amenities such as festivals, museums, historical monuments, or regional culinary traditions are a major draw for tourists because these cultural assets help to build a region's unique identity.

"Creativity is just connecting things. When you ask creative people how they did something, they feel a little guilty because they didn't really do it, they just saw something. It seemed obvious to them after a while. That's because they were able to connect experiences they've had and synthesize new things."

– Steve Jobs

The creative economy is a vibrant and vital force in society. Intellectual and aesthetic sensibilities lead individuals to express themselves through the arts, solve problems through design, and seek out what is beautiful and original. In many ways, the Los Angeles region is unique because of its combination of place, resources, and open attitudes toward new ideas. This openness to new ideas and the ability to make associations and connections not readily apparent to others is one of the defining characteristics of creativity. In Los Angeles, new ideas are constantly given form and brought to life by creative people.

3

NATIONAL AND GLOBAL ECONOMIC CONTEXT

This section briefly summarizes recent and anticipated economic conditions and their likely effects on the Los Angeles region's creative economy.

The current U.S. economic expansion was seven and a half years old at the start of 2017, surpassing the postwar average of just under five years. After averaging 2.2 percent annual growth since 2011, gross domestic product (GDP) slowed to 1.6 percent in 2016. In 2017, U.S. economic growth is expected to accelerate to 2.3 percent. Consumer and business confidence, which rebounded after the November 2016 election, have further strengthened as the economy continued to improve through the first quarter of 2017.

Even with the slowdown in real GDP growth in 2016, the economy continued to add jobs at a steady pace. The unemployment rate ended the year at 4.7 percent (the lowest since 2007), a rate consistent with, or very near to full employment. However, slack remains in the labor market in the form of underemployment and a multi-decade-long decline in labor force participation.

Boosted by stronger job and income growth, real personal consumption expenditures are expected to increase at a pace of 2.6 percent in 2017. Household finances are in good shape mostly as a result of rising home prices and gains in the stock market.

Business fixed investment is expected to improve modestly as the pull-back in energy-related investment that occurred in 2016 reverses course in response to rising energy prices. Cuts in corporate tax rates, should they occur, and a dialing back of regulation could also help drive investment in new plants and equipment. On the other hand, rising labor costs could also encourage firms to invest in labor-saving equipment.

The outlook for the housing market remains cautious. Sales of single-family homes lost momentum in 2016 as tight inventories pushed home prices higher. The shock to affordability is apparent nationwide, but is especially evident in California. Rising mortgage rates will present an additional challenge in 2017.

The outlook for fiscal and monetary policy is less certain. With the return of full employment, the Federal Reserve took a step toward normalizing interest rates with a 0.25 percent increase in the federal funds rate in December 2016 and did so again in March 2017. At least two more rate hikes are expected in 2017. This year may also be the year in which inflation reaches the Federal Reserve's target rate of two percent.

California has outpaced the nation in terms of both economic growth and job creation over the past few years. Nearly all of California's major industries added jobs in 2016 and will do so again in 2017. With improvements across most of the state, California's unemployment rate fell to 5.2 percent in December. While California is doing well overall, growth across the state has been uneven with the large coastal metro areas accounting for the bulk of employment and wage growth.

What does this mean for the creative industries in the Los Angeles region? The creative industries are subject to the same market forces as any other industry. Rising employment and higher wages will benefit sectors that rely on consumer spending, including art galleries, fashion, entertainment, toys, the visual and performing arts, and digital media. Likewise, improvements in the housing market will boost activity for architectural firms and interior designers, and increase demand for furniture and the decorative arts. Moreover, a significant amount of the local creative output is exported, so the improving fortunes of the region's major trading partners will also stimulate growth.

However, the region's creative sector does face some challenges. For example, countries such as China and India have invested heavily in their domestic entertainment industries, increasing competition in those nations for the films produced in the Los Angeles region. Some of the creative industries, especially those with a large manufacturing component (fashion, toys, publishing) will continue to see declines in employment due to increased automation, new technologies, and pressures for lower-cost labor. These are structural changes that are not tied to the business cycle and are still evolving. Finally, the new administration's plans to revise the tax code might hurt nonprofit arts organizations. Several proposed provisions – a lower cap on itemized deductions and a lower top tax rate – would reduce incentives for charitable giving. Federal grant programs that provide funding for the arts also remain a large question mark.

The economic expansion should remain on track at least through 2017. Beyond that, until we have a better read on how the new administration's policy goals will be implemented, the outlook is more opaque. Although subject to the ebb and flow of the economy as a whole, the creative industries of the Los Angeles region form a nexus of culture, business, and technology that will continue to encourage innovation and economic growth throughout the region.

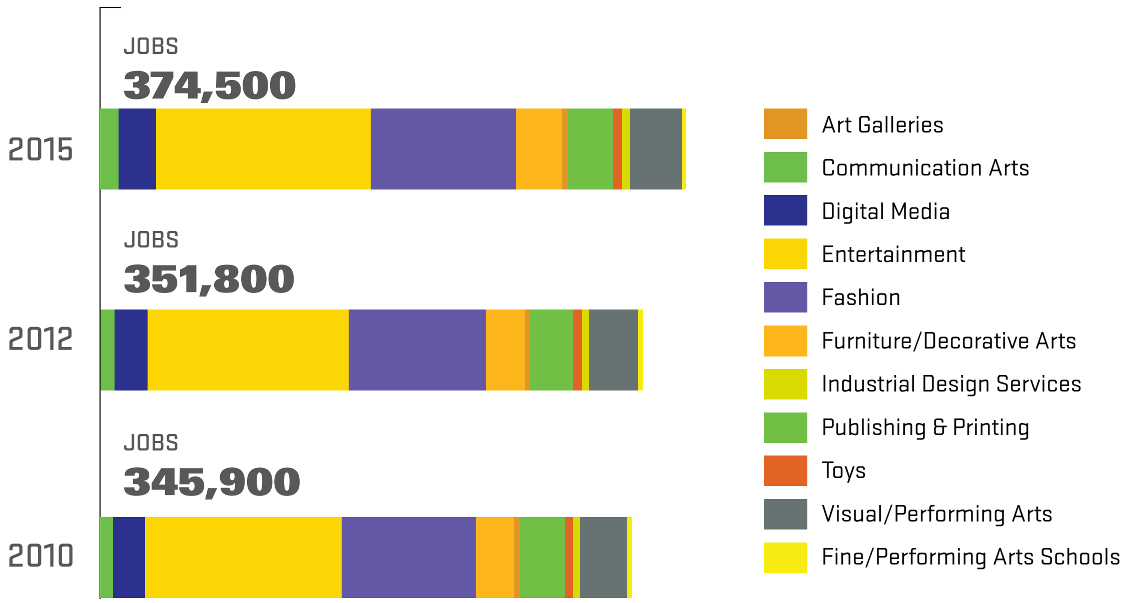
4

CREATIVE INDUSTRY TRENDS

EMPLOYMENT

In 2015, the creative industries in **Los Angeles County** directly employed 374,500 wage and salary workers.[5] This represents an 8.3 percent (28,700 jobs) increase in employment compared with 2010. By major industry sector, the largest employment counts in 2015 were in entertainment (141,400 jobs), fashion (87,600 jobs), and publishing and printing (33,800 jobs). Although the creative economy of Los Angeles County is diverse, these three industries accounted for 70 percent of wage and salary employment in the creative industries.

EXHIBIT 4-1
LOS ANGELES COUNTY CREATIVE INDUSTRY JOB TRENDS, 2010–2015



Source: Bureau of Labor Statistics, QCEW

Almost all of the major industry sectors posted an increase in employment between 2010 and 2015 ranging from 0.6 percent for fashion to 36.9 percent for digital media. The only industry to post a decline was industrial design services. The number of jobs lost (300) was relatively small but it represented nearly 40 percent of employment in this industry. The subsectors adding the largest number of jobs (2010 to 2015) were motion picture/video production, up by 9,700 jobs (9.7 percent); apparel wholesaling, up by 6,000 jobs (29.1 percent); and independent artists and writers, which increased by 3,600 jobs or 38.2 percent.

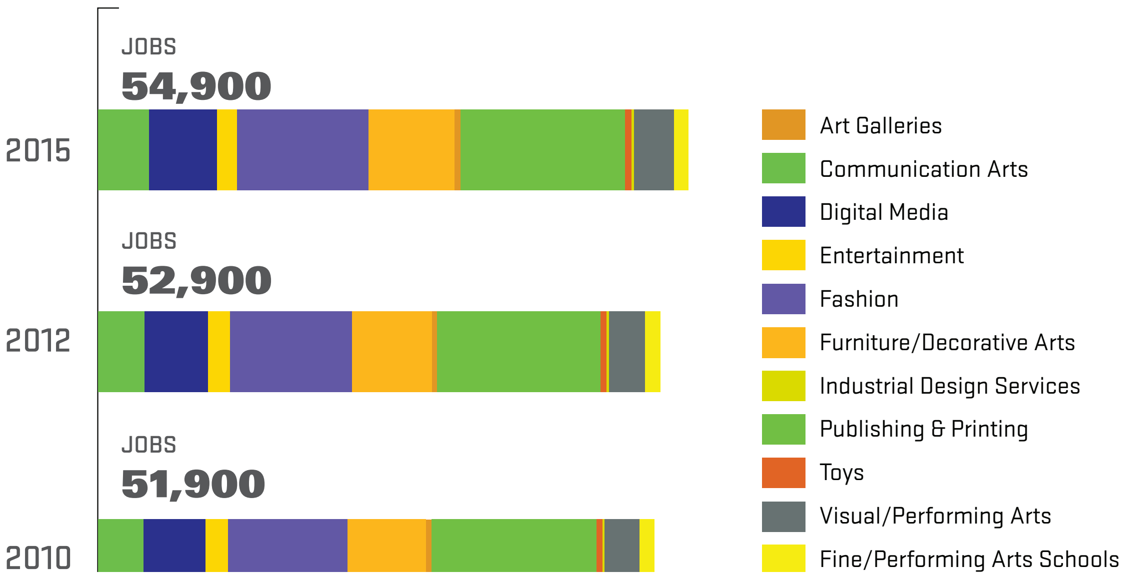
Direct employment in Los Angeles County's creative industries peaked in this cycle in 2007 at 400,500 jobs. In spite of steady growth over six years of recovery and expansion, as of 2015, creative industries employment in Los Angeles County was still below the 2007 peak by 26,000 jobs. In contrast, total wage and salary employment in Los Angeles County surpassed prerecession job counts in 2015. So why is creative industries employment still short of prerecession employment levels?

The answer may lay in the share of manufacturing jobs in the creative industries as compared to employment across all remaining industries. In 2015, service industries (design, wholesale, and retail) made up 75 percent of creative industry employment with manufacturing jobs accounting for the remaining 25 percent.[6] In contrast, the share of manufacturing employment across all industries in the county was just 9.7 percent with nearly 87 percent of private sector employment concentrated in service industries.[7] Therefore, the countywide declines in manufacturing employment over the last three decades have disproportionately affected job counts in the creative industries.

That said, there are a few bright spots in the creative manufacturing sector. A select number of industries experienced employment growth from 2010 to 2015 including furniture manufacturing (up by 12.6 percent, or 1,700 jobs); cosmetics (13.6 percent, 600 jobs); and toy manufacturing (9.8 percent, 200 jobs). Unfortunately, these gains were offset by losses in apparel manufacturing (down by 13.6 percent or almost 6,500 jobs) and printing and related support activities (where payroll employment contracted by 13.4 percent, a loss of nearly 2,200 jobs). Although some manufacturing jobs have returned as a result of economic growth, further advances in automation and the shifting of production to less costly states or countries will prevent manufacturing employment from returning to prerecession levels any time soon.

In **Orange County**, creative industries employment increased by 3,000 jobs (5.7 percent) between 2010 and 2015. Results were mixed compared with Los Angeles County. Only eight of the 12 super sectors posted employment gains. The largest increases occurred in architecture and interior design (which expanded by over 1,600 jobs, a gain of 34.5 percent) followed by digital media (up by 1,500 jobs, 34.7 percent) and communication arts (up by 400 jobs, 10.0 percent). The largest declines were recorded in publishing and printing (-600 jobs, -5.5 percent) and entertainment (-700 jobs, -24.2 percent).

EXHIBIT 4-2:
ORANGE COUNTY CREATIVE INDUSTRY JOB TRENDS 2010–2015



Source: Bureau of Labor Statistics, QCEW

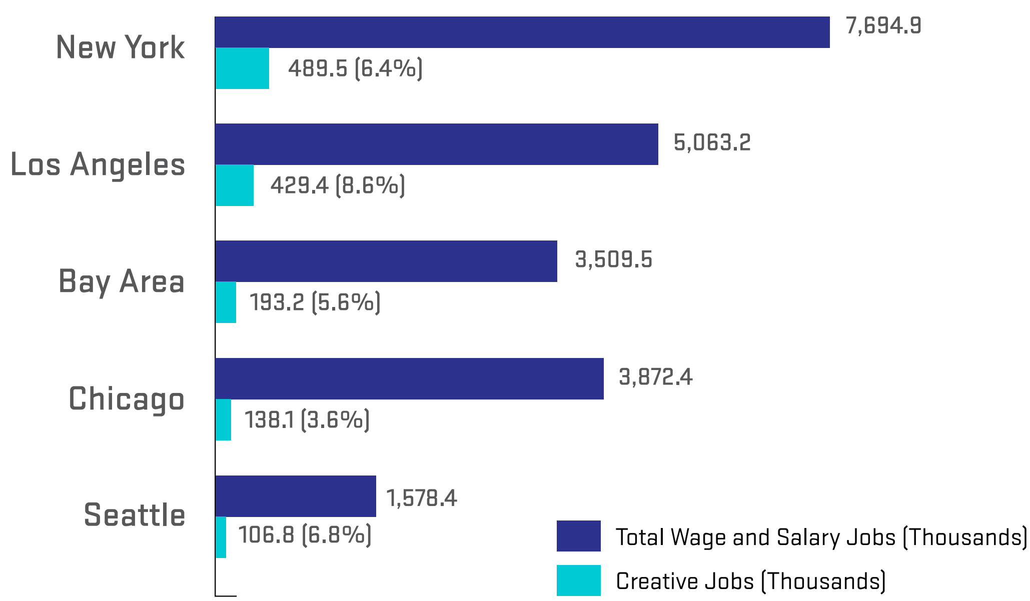
Please see the Industry Snapshots section of this report for the direct, indirect, and induced employment effects of individual industry sectors.

CREATIVE LOS ANGELES: A NATIONAL COMPARISON

Based on the creative industries as defined in this report, in 2015, the Los Angeles metropolitan area was home to the second largest number of creative wage and salary workers (429,400) in the nation. The New York metro area with its larger employment base came in first with 489,500 workers. Rounding out the top five metro areas were the Bay Area (193,200 workers), Chicago (138,100), and Seattle (106,800).

Although the New York metro area had a larger number of workers, creative employment in the Los Angeles region represented a higher share of total wage and salary jobs – that is, creative employment was more concentrated in Los Angeles – 8.6 percent versus 6.4 percent in New York. In fact, of the top five metro areas, the Los Angeles region had the highest concentration of creative workers.

EXHIBIT 4-3:
TOP 5 METRO AREAS FOR CREATIVE INDUSTRIES EMPLOYMENT, CREATIVE % SHARE OF TOTAL EMPLOYMENT, 2015

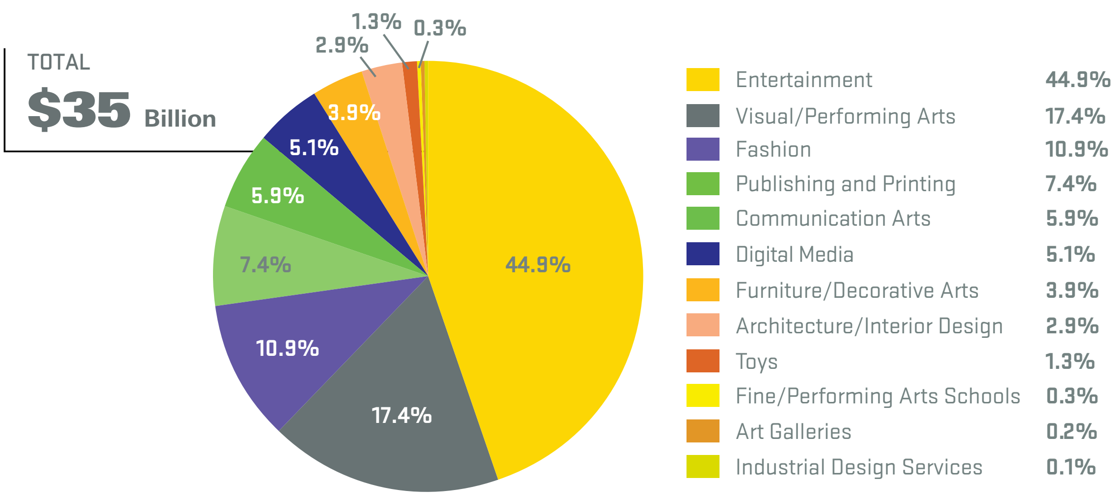


Source: Bureau of Labor Statistics, QCEW

LABOR INCOME

The distribution of labor income across the creative industries provides a sense of how they compare in size and economic contribution. Direct labor income in the creative industries of Los Angeles County totaled $35.0 billion in 2015. At $15.7 billion, the entertainment industry contributed the largest share (44.9 percent) to total creative industry payrolls. The visual and performing arts were a distant second at 17.4 percent ($6.1 billion), followed by fashion at 10.9 percent ($3.8 billion).

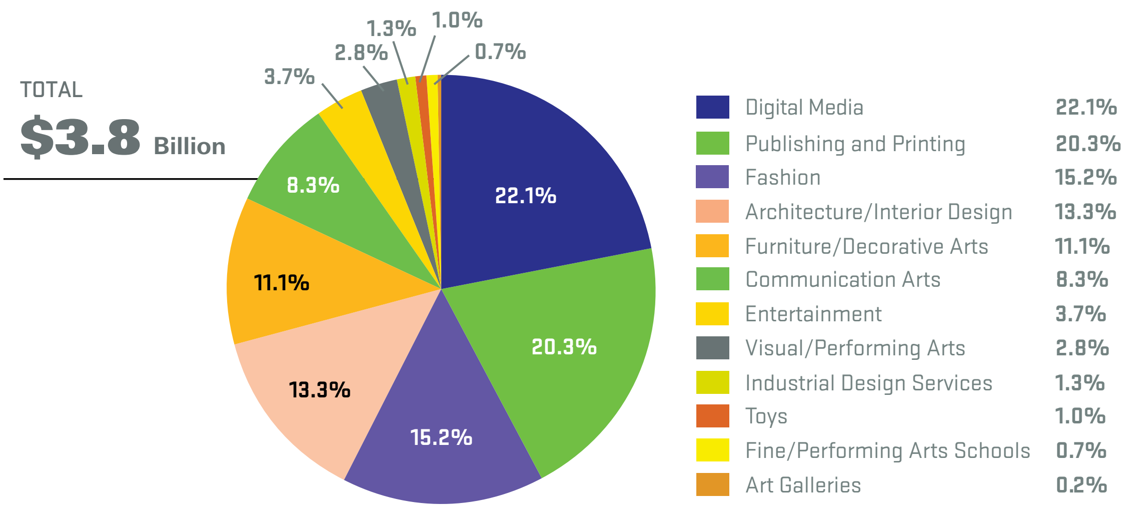
EXHIBIT 4-4:
LOS ANGLES COUNTY CREATIVE INDUSTRIES DIRECT LABOR INCOME, 2015



Source: Bureau of Labor Statistics, QCEW

In the same year, creative industries labor income in Orange County totaled $3.8 billion. In contrast to Los Angeles County, total creative industries payroll in Orange County was not dominated by one industry but was instead distributed across a broader range of industries. Digital media edged past publishing and printing in 2015, with 22.1 percent of the total ($883.5 million). Publishing and printing made up 20.3 percent ($767.6 million), followed by fashion at 15.2 percent ($574.1 million).

EXHIBIT 4-5:
ORANGE COUNTY CREATIVE INDUSTRIES DIRECT LABOR INCOME, 2015



Source: Bureau of Labor Statistics, QCEW

Please see the Industry Snapshots section of this report for the direct, indirect, and induced employment effects of individual industry sectors.

COUNTING THE SELF-EMPLOYED

A large and growing portion of creative industries employment is comprised of talented individuals who are self-employed. Although their contribution to the creative economy is significant, their activities are not captured in the federal and state employment data used to develop most of the job numbers in this report. However, the IRS collects data on people who are classified as "nonemployer firms." These are firms consisting of one person earning revenues but no additional employees. The latest nonemployer data from the IRS is for tax year 2014. It is important to note that some individuals may work on the payroll of an employer and be self-employed as well, so the two data sets (Quarterly Census of Employment and Wages [QCEW] and nonemployer statistics) are not additive.

In 2014, there were 149,457 creative nonemployer firms in Los Angeles County and 25,533 firms in Orange County, representing 15.1 percent and 8.8 percent of total self-employment in each county, respectively. Over the five-year period 2009 through 2014, creative self-employment in Los Angeles County increased at an average annual rate of 4.2 percent (27,768 jobs in total) and by 3.3 percent (3,873 jobs) in Orange County. In contrast, total wage and salary employment during that period expanded on average by just 0.7 percent per year in Los Angeles County and fell by 0.1 percent annually in Orange County.

Visual and performing arts providers continue to make up the largest sector of nonemployer firms, particularly the subsector of independent artists, writers, and performers. A large number of self-employed individuals also appeared in the communication arts sector as freelance graphic artists and commercial or portrait photographers.

Revenues earned by nonemployer firms in Los Angeles reached $7.3 billion in 2014 with 41.3 percent of that total generated by independent artists, writers, and performers. Since 2009, revenues have increased at an average annual rate of 5.7 percent. In Orange County, revenues climbed to $1.0 billion, increasing at an average annual rate of 5.2 percent between 2009 and 2014.

In certain sectors, self-employment is more common than wage and salary employment (Exhibit 4-6). In the visual and performing arts, for example, there were over 2.6 self-employed persons in Los Angeles County for every salaried worker. In Orange County, the ratio was even more striking at nearly four to one. The communication arts also had a high number of self–employed workers relative to salaried employees. In 2014, there were 1.4 self-employed persons in Los Angeles County for every salaried employee, while in Orange County there were two single-person firms for each salaried worker.

Growth rates of creative nonemployer firms versus payroll employment also differed markedly by industry sector (Exhibit 4-7). Overall, creative self-employment is increasing at a faster pace than wage and salary employment. One reason for this could be that many of the jobs lost during the recession did not return with the recovery, forcing or encouraging workers to start their own businesses as independent contractors. On the other hand, with the economy back to or very near full employment, more creative professionals appear to be choosing to go (or stay on) this route as a matter of preference. Individuals now have access to productivity-enhancing technologies that allow them to be competitive in the wider marketplace. The fluid nature of many creative people and their activities may also make them better equipped to take advantage of the changing nature of the relationship between firms and employees, and the evolving nature of work itself.

5
Wage and salary workers are employed by a firm; self-employed workers are not included in this figure.

6
In 2002, manufacturing jobs accounted for 40 percent of all creative industries employment.

7
Mining and logging, and construction account for the remaining 3.6 percent.

EXHIBIT 4-6: RATIO OF CREATIVE SELF-EMPLOYED INDIVIDUALS TO WAGE AND SALARY EMPLOYEES BY SECTOR, 2014

INDUSTRY SECTOR	Los Angeles County			Orange County		
	Self-Employed	Wage and Salary Employees	Ratio	Self-Employed	Wage and Salary Employees	Ratio
Architecture and Interior Design	5,104	11,300	0.45	1,672	5,900	0.28
Art Galleries	695	800	0.87	206	200	1.03
Communication Arts	28,246	19,900	1.42	9,034	4,300	2.10
Digital Media	---	6,100	---	---	5,200	---
Entertainment	20,867	135,200	0.15	1,516	2,100	0.72
Fashion	6,783	89,200	0.08	1,415	11,100	0.13
Furniture and Decorative Arts	1,634	28,800	0.06	504	7,900	0.06
Industrial Design Services	---	400	---	---	500	---
Publishing and Printing	4,298	32,300	0.13	1,424	12,700	0.11
Toys	393	4,700	0.08	115	500	0.23
Visual and Performing Arts Providers	81,437	31,500	2.59	9,647	2,600	3.71
Fine and Performing Arts Schools	---	3,900	---	---	1,000	---

Note: Nonemployer data are not available for Digital Media, Industrial Design Services, and Fine and Performing Arts Schools
Source: U.S. Census Bureau Nonemployer Statistics, Bureau of Labor Statistics, QCEW

EXHIBIT 4-7: COMPARATIVE AVERAGE ANNUAL GROWTH RATES OF CREATIVE SELF-EMPLOYED INDIVIDUALS TO SALARIED EMPLOYEES, 2009–2014

INDUSTRY SECTOR	Los Angeles County		Orange County	
	Self-Employment Growth	Wage and Salary Employment Growth	Self-Employment Growth	Wage and Salary Employment Growth
Architecture and Interior Design	3.4%	0.1%	0.9%	3.4%
Art Galleries	2.2%	-1.8%	-0.2%	-8.3%
Communication Arts	4.1%	1.5%	4.6%	1.9%
Digital Media	---	1.1%	---	3.8%
Entertainment	3.9%	0.9%	3.3%	-4.0%
Fashion	1.7%	0.5%	1.3%	0.7%
Furniture and Decorative Arts	0.4%	-0.1%	-0.4%	-2.6%
Industrial Design Services	---	-7.5%	---	2.8%
Publishing and Printing	0.9%	-2.7%	-0.7%	-2.5%
Toys	0.7%	-0.3%	-0.3%	5.9%
Visual and Performing Arts Providers	4.9%	4.6%	4.0%	1.6%
Fine and Performing Arts Schools	---	4.5%	---	3.5%
Total Employment Growth:	4.2%	0.7%	3.3%	-0.1%

Note: Nonemployer data are not available for Digital Media, Industrial Design Services, and Fine and Performing Arts Schools
Source: U.S. Census Bureau Nonemployer Statistics, Bureau of Labor Statistics, QCEW

EXHIBIT 4-8: NUMBER OF CREATIVE NONEMPLOYER FIRMS IN LOS ANGELES COUNTY

CREATIVE INDUSTRY	NAICS Code	2009	2010	2011	2012	2013	2014	5-Year Employment Change	Avg. Annual Growth Rate 2009-2014
Architecture and Interior Design		**4,311**	**4,525**	**4,666**	**4,748**	**4,937**	**5,104**	**793**	**3.4%**
Architectural Services	54131	2,480	2,630	2,736	2,735	2,777	2,867	387	2.9%
Drafting Services	54134	892	874	873	912	953	990	98	2.1%
Landscape Design	54132	939	1,021	1,057	1,101	1,207	1,247	308	5.8%
Art Galleries	**45392**	**623**	**627**	**628**	**655**	**647**	**695**	**72**	**2.2%**
Communication Arts		**23,071**	**24,161**	**25,191**	**26,166**	**26,954**	**28,246**	**5,175**	**4.1%**
Specialized Design Services	5414	11,262	11,623	12,171	12,484	12,623	13,191	1,929	3.2%
Advertising Agencies	5418	6,590	7,040	7,232	7,743	8,059	8,391	1,801	5.0%
Photographic Services	54192	5,219	5,498	5,788	5,939	6,272	6,664	1,445	5.0%
Entertainment		**17,240**	**17,852**	**18,669**	**19,443**	**20,084**	**20,867**	**3,627**	**3.9%**
Motion Picture/Video Production	5121	13,744	14,306	14,992	15,601	16,157	16,906	3,162	4.2%
Sound Recording	5122	2,504	2,557	2,676	2,841	2,945	2,922	418	3.1%
Broadcasting (except Internet)	515	992	989	1,001	1,001	982	1,039	47	0.9%
Fashion		**6,220**	**6,365**	**6,493**	**6,660**	**6,593**	**6,783**	**563**	**1.7%**
Textile Mills Manufacturing	313	92	106	109	138	115	115	23	4.6%
Apparel Manufacturing	315	2,025	2,022	2,041	2,161	2,129	2,290	265	2.5%
Apparel Wholesaling	4243	2,460	2,559	2,588	2,620	2,588	2,615	155	1.2%
Footwear Manufacturing	3162	50	51	45	57	63	54	4	1.6%
Other Leather and Allied Prods Mfg	31699	106	110	105	106	116	109	3	0.6%
Jewelry Wholesaling	42394	1,487	1,517	1,605	1,578	1,582	1,600	113	1.5%
Furniture and Decorative Arts:		**1,598**	**1,594**	**1,602**	**1,637**	**1,601**	**1,634**	**36**	**0.4%**
Textile Product Mills	314	127	124	119	144	140	125	-2	-0.3%
Furniture Manufacturing	337	690	700	700	673	672	696	6	0.2%
Furniture Wholesaling	4232	624	608	616	649	631	636	12	0.4%
Glass and Glass Product Mfg.	32721	90	94	99	97	91	109	19	4%
Other Nonmetallic Mineral Product Mfg.	3279	67	68	68	74	67	68	1	0%
Publishing and Printing		**4,107**	**4,111**	**4,131**	**4,299**	**4,147**	**4,298**	**191**	**0.9%**
Printing and Related Support Activities	3231	1,410	1,394	1,379	1,401	1,340	1,373	-37	-0.5%
Book, Periodical, Newspaper Wholesalers	42492	243	239	232	227	213	209	-34	-3.0%
Publishing Industries (Except Internet)	511	2,454	2,478	2,520	2,671	2,594	2,716	262	2.0%
Toys:		**379**	**355**	**398**	**402**	**424**	**393**	**14**	**0.7%**
Toy Wholesaling	42392	379	355	398	402	424	393	14	0.7%
Visual and Performing Arts Providers:		**64,140**	**67,378**	**70,714**	**73,212**	**76,567**	**81,437**	**17,297**	**4.9%**
Performing Arts Companies	7111	3,517	3,729	3,827	4,174	4,662	5,069	1,552	7.6%
Agents and Managers of Artists, etc.	71141	3,950	4,231	4,530	4,719	4,642	4,834	884	4.1%
Independent Artists, Writers, etc.	71151	56,455	59,220	62,138	64,108	67,059	71,320	14,865	4.8%
Museums	7121	218	198	219	211	204	214	-4	-0.4%
TOTALS:		**121,689**	**126,968**	**132,492**	**137,222**	**141,954**	**149,457**	**27,768**	**4.2%**

Source: U.S Census Bureau, Nonemployer Statistics

EXHIBIT 4-9: VALUE OF RECEIPTS ($1,000S) OF CREATIVE FIRMS IN LOS ANGELES COUNTY

CREATIVE INDUSTRY	NAICS Code	2009	2010	2011	2012	2013	2014	5-Year Employment Change	Avg. Annual Growth Rate 2009–2014
Architecture and Interior Design:		**179,028**	**186,562**	**186,090**	**201,011**	**217,712**	**235,500**	**56,472**	**5.6%**
Architectural Services	**54131**	125,996	131,068	127,910	136,824	150,022	158,602	32,606	4.7%
Drafting Services	**54134**	21,405	21,437	22,499	25,640	26,731	30,614	9,209	7.4%
Landscape Design	**54132**	31,627	34,057	35,681	38,547	40,959	46,284	14,657	7.9%
Art Galleries	**45392**	**$38,710**	**$42,038**	**$43,377**	**$45,523**	**$48,796**	**$52,619**	**$13,909**	**6.3%**
Communication Arts:		**943,564**	**1,035,781**	**1,092,904**	**1,159,892**	**1,207,109**	**1,309,911**	**366,347**	**6.8%**
Specialized Design Services	**5414**	417,292	460,052	489,120	517,363	532,335	585,674	168,382	7.0%
Advertising Agencies	**5418**	354,643	388,806	409,646	437,802	463,582	491,688	137,045	6.8%
Photography Services	**54192**	171,629	186,923	194,138	204,727	211,192	232,549	60,920	6.3%
Entertainment:		**805,064**	**825,219**	**883,977**	**943,347**	**949,816**	**1,026,908**	**221,844**	**5.0%**
Motion Picture/Video Production	**5121**	659,462	677,125	726,211	778,094	785,807	852,541	193,079	5.3%
Sound Recording	**5122**	103,708	104,514	113,229	119,718	115,569	122,733	19,025	3.4%
Broadcasting (except Internet)	**515**	41,894	43,580	44,537	45,535	48,440	51,634	9,740	4.3%
Fashion:		**618,772**	**658,543**	**706,510**	**690,030**	**690,868**	**689,314**	**70,542**	**2.2%**
Textile Mills Manufacturing	**313**	3,340	3,119	4,729	7,073	6,245	5,101	1,761	8.8%
Apparel Manufacturing	**315**	110,781	118,657	117,175	116,781	117,439	122,738	11,957	2.1%
Apparel Wholesaling	**4243**	293,280	324,198	348,263	344,952	341,740	352,693	59,413	3.8%
Footwear Manufacturing	**3162**	3,273	3,171	2,384	2,146	2,713	3,202	-71	-0.4%
Other Leather and Allied Products Mfg.	**31699**	5,260	5,982	7,991	6,256	7,469	6,465	1,205	4.2%
Jewelry Wholesaling	**42394**	202,838	203,416	225,968	212,822	215,262	199,115	-3,723	-0.4%
Furniture and Decorative Arts:		**112,629**	**108,184**	**119,985**	**122,725**	**125,491**	**130,060**	**17,431**	**2.9%**
Textile Product Mills	**314**	11,677	11,662	9,109	8,896	8,657	6,502	-5,175	-11.1%
Furniture Manufacturing	**337**	44,039	41,340	48,470	44,290	51,910	51,605	7,566	3.2%
Furniture Wholesaling	**4232**	51,339	46,234	51,995	58,285	55,572	61,205	9,866	3.6%
Glass and Glass Product Mfg.	**32721**	2,547	4,522	5,742	5,815	4,849	5,886	3,339	18.2%
Other Nonmetallic Mineral Product Mfg.	**3279**	3,027	4,426	4,669	5,439	4,503	4,862	1,835	9.9%
Publishing and Printing		**195,201**	**206,425**	**202,118**	**208,423**	**206,111**	**232,787**	**37,586**	**3.6%**
Printing and Related Support Activities	**3231**	74,620	81,038	77,578	83,811	75,130	82,903	8,283	2.1%
Book, Periodical, Newspaper Wholesalers	**42492**	14,866	14,688	14,124	15,308	15,449	32,402	17,536	16.9%
Publishing Industries (Except Internet)	**511**	105,715	110,699	110,416	109,304	115,532	117,482	11,767	2.1%
Toys:		**31,966**	**34,493**	**36,105**	**29,653**	**34,323**	**52,619**	**20,653**	**10.5%**
Toy Wholesaling	**42392**	31,966	34,493	36,105	29,653	34,323	52,619	20,653	10.5%
Visual and Performing Arts Providers:		**2,569,563**	**2,672,330**	**2,890,152**	**3,144,715**	**3,212,105**	**3,530,249**	**960,686**	**6.6%**
Performing Arts Companies.	**7111**	181,278	196,419	191,416	213,831	221,041	223,801	42,523	4.3%
Agents and Managers of Artists, etc.	**71141**	224,665	235,583	264,468	279,600	278,280	304,281	79,616	6.3%
Independent Artists, Writers, etc.	**71151**	2,158,842	2,236,414	2,429,588	2,645,531	2,708,334	2,997,749	838,907	6.8%
Museums	**7121**	4,778	3,914	4,680	5,753	4,450	4,418	-360	-1.6%
TOTALS:		**$5,494,497**	**$5,769,575**	**$6,161,218**	**$6,545,319**	**$6,692,331**	**$7,259,967**	**$1,765,470**	**5.7%**

Source: U.S Census Bureau, Nonemployer Statistics

EXHIBIT 4-10: NUMBER OF CREATIVE NONEMPLOYER FIRMS IN ORANGE COUNTY

CREATIVE INDUSTRY	NAICS Code	2009	2010	2011	2012	2013	2014	5-Year Employment Change	Avg. Annual Growth Rate 2009-2014
Architecture and Interior Design:		**1,601**	**1,660**	**1,677**	**1,713**	**1,699**	**1,672**	**71**	**0.9%**
Architectural Services	54131	877	940	934	935	893	905	28	0.6%
Drafting Services	54134	358	365	369	375	396	379	21	1.1%
Landscape Design	54132	366	355	374	403	410	388	22	1.2%
Art Galleries	**45392**	**208**	**209**	**196**	**205**	**209**	**206**	**-2**	**-0.2%**
Communication Arts:		**7,214**	**7,718**	**7,916**	**8,226**	**8,477**	**9,034**	**1,820**	**4.6%**
Specialized Design Services	5414	3,475	3,652	3,647	3,773	3,899	4,136	661	3.5%
Advertising Agencies	5418	2,339	2,542	2,619	2,701	2,739	2,908	569	4.5%
Photographic Services	54192	1,400	1,524	1,650	1,752	1,839	1,990	590	7.3%
Entertainment:		**1,290**	**1,027**	**1,365**	**1,531**	**1,569**	**1,516**	**226**	**3.3%**
Motion Picture/Video Production	5121	841	587	923	1046	1073	1046	205	4.5%
Sound Recording	5122	252	243	241	253	269	262	10	0.8%
Broadcasting (except Internet)	515	197	197	201	232	227	208	11	1.1%
Fashion:		**1,326**	**1,301**	**1,387**	**1,408**	**1,385**	**1,415**	**89**	**1.3%**
Textile Mills Manufacturing	313	17	24	22	22	17	22	5	5.3%
Apparel Manufacturing	315	443	443	469	471	469	495	52	2.2%
Apparel Wholesaling	4243	555	521	581	574	560	557	2	0.1%
Footwear Manufacturing	3162	5	3	6	10	11	11	6	17.1%
Other Leather and Allied Products Mfg	31699	17	13	19	26	18	25	8	8.0%
Jewelry Wholesaling	42394	289	297	290	305	310	305	16	1.1%
Furniture and Decorative Arts:		**515**	**493**	**479**	**498**	**511**	**504**	**-11**	**-0.4%**
Textile Product Mills	314	26	28	32	36	37	33	7	4.9%
Furniture Manufacturing	337	164	171	154	162	163	163	-1	-0.1%
Furniture Wholesaling	4232	274	243	228	238	253	249	-25	-1.9%
Glass and Glass Product Mfg.	32721	25	23	33	35	37	38	13	8.7%
Other Nonmetallic Mineral Product Mfg.	3279	26	28	32	27	21	21	-5	-4.2%
Publishing and Printing		**1,478**	**1,481**	**1,495**	**1,424**	**1,405**	**1,424**	**-54**	**-0.7%**
Printing and Related Support Activities	3231	594	605	577	559	524	539	-55	-1.9%
Book, Periodical, Newspaper Wholesalers	42492	83	72	70	75	77	77	-6	-1.5%
Publishing Industries (Except Internet)	511	801	804	848	790	804	808	7	0.2%
Toys:		**117**	**107**	**113**	**115**	**107**	**115**	**-2**	**-0.3%**
Toy Wholesaling	42392	117	107	113	115	107	115	-2	-0.3%
Visual and Performing Arts Providers:		**7,911**	**8,185**	**8,527**	**8,853**	**9,088**	**9,647**	**1,736**	**4.0%**
Performing Arts Companies	7111	576	611	598	622	712	807	231	7.0%
Agents and Managers of Artists, etc.	71141	432	470	488	515	463	510	78	3.4%
Independent Artists, Writers, etc.	71151	6,866	7,071	7,394	7,656	7,869	8,281	1,415	3.8%
Museums	7121	37	33	47	60	44	49	12	5.8%
TOTALS:		**21,660**	**22,181**	**23,155**	**23,973**	**24,450**	**25,533**	**3,873**	**3.3%**

Note: The U.S Census Bureau does not provide nonemployer data for Software Publishers (NAICS 5112) and Industrial Design Services (NAICS 54142)
Source: U.S Census Bureau, Nonemployer Statistics

EXHIBITS 4-11: VALUE OF RECEIPTS ($1,000S) OF CREATIVE NONEMPLOYER FIRMS IN ORANGE COUNTY

CREATIVE INDUSTRY	NAICS Code	2009	2010	2011	2012	2013	2004	5-Year Employment Change	Avg. Annual Growth Rate 2009-2014
Architecture and Interior Design:		**66,488**	**77,020**	**80,849**	**81,550**	**92,112**	**88,919**	**22,431**	**6.0%**
Architectural Services	54131	43,543	52,203	57,184	55,233	63,673	58,955	15,412	6.2%
Drafting Services	54134	7,203	8,431	8,441	8,548	9,512	10,321	3,118	7.5%
Landscape Design	54132	15,742	16,386	15,224	17,769	18,927	19,643	3,901	4.5%
Art Galleries	**45392**	**$13,862**	**$11,618**	**$14,912**	**$13,529**	**$12,244**	**$10,742**	**-$3,120**	**-5.0%**
Communication Arts:		**292,785**	**322,608**	**338,696**	**351,448**	**369,146**	**395,145**	**102,360**	**6.2%**
Specialized Design Services	5414	133,785	140,533	148,930	152,977	163,962	178,481	44,696	5.9%
Advertising Agencies	5418	123,431	144,142	147,422	151,424	154,787	163,074	39,643	5.7%
Photographic Services	54192	35,569	37,933	42,344	47,047	50,397	53,590	18,021	8.5%
Entertainment:		**47,495**	**51,397**	**57,183**	**59,227**	**52,595**	**54,551**	**7,056**	**2.8%**
Motion Picture/Video Production	5121	35,337	34,358	39,765	41,632	36,500	38,383	3,046	1.7%
Sound Recording	5122	5,920	6,879	7,361	7,968	7,245	7,795	1,875	5.7%
Broadcasting (except Internet)	515	6,238	10,160	10,057	9,627	8,850	8,373	2,135	6.1%
Fashion:		**89,699**	**93,737**	**112,936**	**109,028**	**109,825**	**111,381**	**21,682**	**4.4%**
Textile Mills Manufacturing	313	421	760	1,455	453	374	339	-82	-4.2%
Apparel Manufacturing	315	21,010	23,539	27,172	25,562	28,104	25,656	4,646	4.1%
Apparel Wholesaling	4243	49,995	46,205	59,523	54,721	50,156	58,206	8,211	3.1%
Footwear Manufacturing	3162	122	90	322	515	296	642	520	39.4%
Other Leather and Allied Products Mfg	31699	530	766	823	427	446	614	84	3.0%
Jewelry Wholesaling	42394	17,621	22,377	23,641	27,350	30,449	25,924	8,303	8.0%
Furniture and Decorative Arts:		**39,899**	**37,734**	**40,912**	**40,030**	**44,466**	**49,021**	**9,122**	**4.2%**
Textile Product Mills	314	1,395	1,131	1,453	1,242	2,114	2,406	1,011	11.5%
Furniture Manufacturing	337	11,126	11,299	9,228	9,951	9,824	11,037	-89	-0.2%
Furniture Wholesaling	4232	24,597	22,577	26,196	23,934	27,927	31,009	6,412	4.7%
Glass & Glass Products Mfg.	32721	823	821	1,518	2,472	2,718	2,679	1,856	26.6%
Other Nonmetallic Mineral Product Mfg.	3279	1,958	1,906	2,517	2,431	1,883	1,890	-68	-0.7%
Publishing and Printing		**70,306**	**76,466**	**77,635**	**74,971**	**78,870**	**80,547**	**10,241**	**2.8%**
Printing and Related Support Activities	3231	36,781	41,555	43,235	41,899	40,695	43,826	7,045	3.6%
Book, Periodical, Newspaper Wholesalers	42492	3,138	3,510	3,944	3,197	5,590	5,362	2,224	11.3%
Publishing Industries (Except Internet)	511	30,387	31,401	30,456	29,875	32,585	31,359	972	0.6%
Toys:		**7,292**	**8,467**	**11,490**	**13,060**	**10,291**	**14,547**	**7,255**	**14.8%**
Toy Wholesaling	42392	7,292	8,467	11,490	13,060	10,291	14,547	7,255	14.8%
Visual and Performing Arts Providers:		**165,989**	**178,604**	**189,954**	**194,567**	**197,923**	**218,733**	**52,744**	**5.7%**
Performing Arts Companies.	7111	13,607	15,097	15,713	17,283	19,937	23,627	10,020	11.7%
Agents and Managers of Artists, etc.	71141	16,429	18,443	17,827	18,042	16,464	19,774	3,345	3.8%
Independent Artists, Writers, etc.	71151	134,983	143,402	154,729	157,512	160,063	174,314	39,331	5.2%
Museums	7121	970	1,662	1,685	1,730	1,459	1,018	48	1.0%
TOTALS:		**$793,815**	**$857,651**	**$924,567**	**$937,410**	**$967,472**	**$1,023,586**	**$229,771**	**5.2%**

Note: The U.S Census Bureau does not provide nonemployer data for Software Publishers (NAICS 5112) and Industrial Design Services (NAICS 54142)
Source: U.S Census Bureau, Nonemployer Statistics

5

ECONOMIC CONTRIBUTION OF THE CREATIVE INDUSTRIES

EMPLOYMENT AND WAGES

While direct job counts in the creative industries of the Los Angeles region are notable in and of themselves (429,400 in 2015), they support an even larger employment network. Direct employees are those who actually work in the creative industries of the Los Angeles region. Indirect jobs are created when firms in these industries make purchases from their suppliers and vendors. Additional induced jobs are generated when the direct and indirect employees spend their wages on consumer goods and services. In that sense, every job within the creative sector supports or sustains other jobs in the region.

The ripple effect is substantial, giving rise to job gains and increases in income across a wide range of industries throughout the regional economy. In addition to 429,400 direct jobs, the creative industries of the Los Angeles region generated 329,600 indirect and induced jobs for a total of 759,000 jobs in 2015,[8] up from 744,100 in 2014. Moreover, labor income earned by these workers was $56.9 billion, up from $54.4 billion a year earlier.

TAX EFFECTS

Activity in the creative sectors triggers not only jobs and spending, but also results in tax revenues for state and local government that help to fund local projects. As with jobs, there is a ripple effect with tax revenues because the initial direct effects give rise to indirect and induced effects.

In the Los Angeles region, property taxes, state and local personal income taxes, and sales taxes generated by the creative industries totaled $8.2 billion in 2015, as calculated by the LAEDC. By sector, entertainment generated tax revenues of $3.1 billion, followed by fashion at $2.1 billion, and publishing and printing at $677 million.

THE ECONOMIC CONTRIBUTION OF THE CREATIVE INDUSTRIES

In terms of their overall contribution to the regional economy, the creative industries of the Los Angeles region generated $190.3 billion in economic output in 2015, an increase of $13.4 billion (7.6 percent) over the previous year, the combined result of economic growth, employment growth, and increased labor productivity. Of the $190.3 billion in economic output, $117.4 billion was value-added (corporate profits and labor income). This net economic contribution of $117.4 billion was the equivalent of 13.7 percent of the region's gross product of $855 billion in 2015.

EXHIBIT 5-1: ECONOMIC CONTRIBUTION OF THE CREATIVE INDUSTRIES, 2015

	Los Angeles County	Orange County	Los Angeles Region
EMPLOYMENT	**665,800**	**93,100**	**758,000**
Direct	374,500	54,900	429,400
Indirect and Induced	291,300	38,200	329,500
LABOR INCOME ($ BILLIONS)	**51.3**	**5.6**	**56.9**
Direct	35.3	3.8	39.1
Indirect and Induced	16.0	1.8	17.8
OUTPUT ($ BILLIONS)	**170.7**	**19.6**	**190.3**
Direct	127.4	13.8	141.2
Indirect and Induced	43.3	$5.8	49.1
STATE/LOCAL TAXES ($ BILLIONS)	**7.4**	**0.8**	**8.2**

Source: Bureau of Labor Statistics, Estimates by LAEDC IAE

8
These jobs include full- and part-time workers, wage and salary employment, and self-employment.

LOOKING AHEAD: THE CREATIVE ECONOMY IN 2020

Employment moves with the business cycle, declining during recessions and growing again when the economy is expanding. The Los Angeles region recorded another year of employment growth in 2015 in step with the expansion of the national economy. Most industries experienced job gains, and while a few posted losses, the declines were relatively small. After a long period of near stagnation, wage growth has also started to pick up.

The LAEDC projects creative industry employment in the Los Angeles region will grow by 5.2 percent from 2015 to 2020. Creative industry wage and salary job counts will climb from 424,470 in 2015 to 446,620 in 2020, an increase of 22,140 jobs over the period.[9] Growth is anticipated across the entire set of creative industries, but the pace will vary by sector. The largest percentage gains will occur in industries with a strong technology component like digital media and communication arts. The revolution in how media content is created and delivered will continue to fuel demand for digital media workers across a number of industries including entertainment, publishing, and advertising.

As employment and wages increase, household income also rises. This allows workers to spend more of their earnings on entertainment, apparel, home furnishings, and other consumer goods. With their links to real estate and construction, architecture and interior design will also see robust growth. Stronger economic growth and higher household incomes will also mean more workers are hired at art galleries and in the entertainment, furniture and decorative arts, and the visual and performing arts industries. While job growth is expected to continue over the forecast period (2015 to 2020), creative industries employment will still fall short of the prerecession peak of 464,100 reached in 2007, mainly due to recession-era declines in entertainment and manufacturing-related activities.

Los Angeles County: Total creative industry employment in Los Angeles County has increased each year since 2010. This trend will continue through the next five years with the addition of over 19,000 jobs (an increase of 5.1 percent), boosting employment from 370,770 jobs in 2015 to 389,780 in 2020. The largest numeric gain (9,800 jobs) will occur in the creative sector with the largest employment base, entertainment, followed by increases in the visual and performing arts (2,500 jobs) and communication arts (2,100 jobs). Together, these three industries will account for three-quarters of all anticipated job gains.

EXHIBIT 6-1: LOS ANGELES COUNTY CREATIVE INDUSTRIES EMPLOYMENT FORECAST, 2015–2010

	Number of Jobs (Thousands)		Change 2015–2020		Average Annual
CREATIVE INDUSTRY	2015	2020f	Number	Percent	Growth Rate
Architecture and Interior Design	12,100	13,300	1,200	9.9%	1.9%
Art Galleries	840	910	70	8.3%	1.6%
Communication Arts	20,900	23,000	2,100	10.0%	1.9%
Digital Media	7,200	8,600	1,400	19.4%	3.6%
Entertainment	141,400	151,200	9,800	6.9%	1.3%
Fashion	87,600	87,800	200	0.2%	0.0%
Furniture and Decorative Arts	29,600	31,000	1,400	4.7%	0.9%
Industrial Design Services	430	470	40	9.3%	1.8%
Publishing and Printing	33,800	34,100	300	0.9%	0.2%
Toys	4,700	4,700	0	0.0%	0.0%
Visual and Performing Arts Providers	32,200	34,700	2,500	7.8%	1.5%
TOTALS:	**370,770**	**389,780**	**19,910**	**5.1%**	**1.0%**

Sources: Bureau of Labor Statistics, QCEW; Forecasts by IAE

Orange County: Creative industry employment in Orange County has risen in each year since 2012. Gains are expected to continue through 2020 with employment expanding from 53,700 jobs in 2015 to 56,840 in 2020 (an increase of 5.8 percent). The largest employment gains will be in digital media (1,000 jobs), architecture and interior design (700 jobs), and communications arts (500 jobs).

EXHIBIT 6-2: ORANGE COUNTY CREATIVE INDUSTRIES EMPLOYMENT FORECAST, 2015–2010

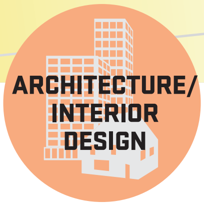
	Number of Jobs (Thousands)		Change 2015–2020		Average Annual Growth Rate
CREATIVE INDUSTRY	2015	2020f	Number	Percent	
Architecture and Interior Design	6,300	7,000	700	11.1%	2.1%
Art Galleries	200	210	10	5.0%	1.0%
Communication Arts	4,200	4,700	500	11.9%	2.3%
Digital Media	6,000	7,000	1,000	16.7%	3.1%
Entertainment	1,900	1,900	0	0.0%	0.0%
Fashion	10,600	11,000	400	3.8%	0.7%
Furniture and Decorative Arts	8,200	8,400	200	2.4%	0.5%
Industrial Design Services	500	630	130	26.0%	4.7%
Publishing and Printing	12,700	12,800	100	0.8%	0.2%
Toys	500	500	0	0.0%	0.0%
Visual and Performing Arts Providers	2,600	2,700	100	3.8%	0.8%
TOTALS:	**53,700**	**56,840**	**3,140**	**5.8%**	**1.1%**

Sources: Bureau of Labor Statistics, QCEW; Forecasts by IAE

9
Employment at Fine and Performing Arts Schools is not included in this forecast so the total employment number reported for 2015 in this section differs from the figure reported elsewhere in this report.

7 INDUSTRY SNAPSHOTS

The North American Industry Classification system (NAICS) classifies business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. economy. The NAICS industry codes define establishments based on the activities in which they are primarily engaged.



ARCHITECTURE AND INTERIOR DESIGN

This sector includes firms that specialize in architectural services, interior design, landscape design, and drafting services.

NAICS	Description
54131	Architectural services
54132	Landscape design
54134	Drafting services
54141	Interior design
332323	Ornamental and architectural metal work manufacturing

EXHIBIT 7-1: NUMBER OF JOBS
Architecture and Interior Design Job Growth

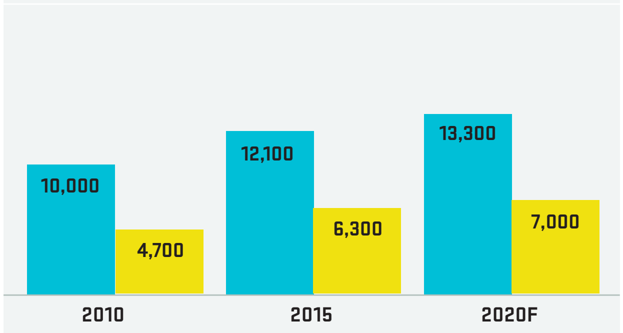


EXHIBIT 7-2: PERCENT CHANGE
Architecture and Interior Design Job Growth

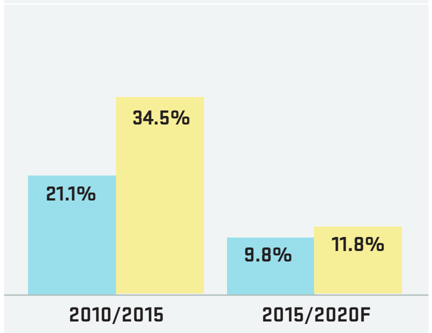


EXHIBIT 7-3: ECONOMIC CONTRIBUTION OF THE ARCHITECTURE AND INTERIOR DESIGN INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	1,858	784	2,642
Jobs	12,100	6,300	18,400
Labor Income ($ millions)	999.4	503.2	1,502.6
Nonemployer establishments, 2014	5,104	1,672	6,776
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ millions)	$3.6	$1.8	5.4
Total Jobs	22,000	11,300	33,300
Total Labor Income ($ millions)	1.5	0.8	$2.3
Total Taxes ($ millions)	130.7	64.7	$195.4

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

ART GALLERIES

Los Angeles is a world-class art city, attracting influential collectors from around the globe. The presence of artists and art galleries throughout the region enhance the quality of life for residents and is a major draw for cultural tourists.

NAICS	Description
45392	Art galleries

EXHIBIT 7-4: NUMBER OF JOBS
Art Galleries Job Growth

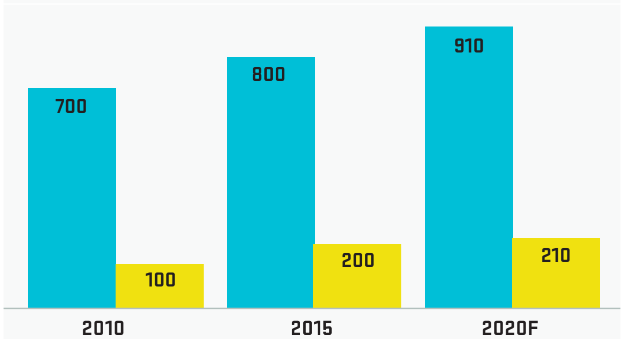


EXHIBIT 7-5: PERCENT CHANGE
Art Galleries Job Growth

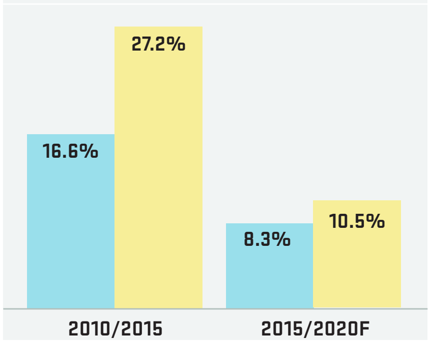


EXHIBIT 7-6: ECONOMIC CONTRIBUTION OF ART GALLERIES, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	233	48	281
Jobs	800	200	1,000
Labor Income ($ millions)	60.4	7.3	67.7
Nonemployer establishments, 2014	695	206	901
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ millions)	87.7	15.7	103.4
Total Jobs	1,200	200	1,400
Total Labor Income ($ millions)	77.2	9.8	87.0
Total Taxes ($ millions)	10.4	1.8	12.2

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

COMMUNICATION ARTS

Individuals working in communication arts combine art and technology to communicate ideas through images and other communications media. This diverse sector is dominated by advertising agencies and firms that specialize in graphic design. It also includes commercial and portrait photographers.

NAICS	Description
54143	Graphic design
54181	Advertising agencies
541921	Photography studios, portrait
541922	Commercial photography

EXHIBIT 7-7: NUMBER OF JOBS
Communication Arts Job Growth

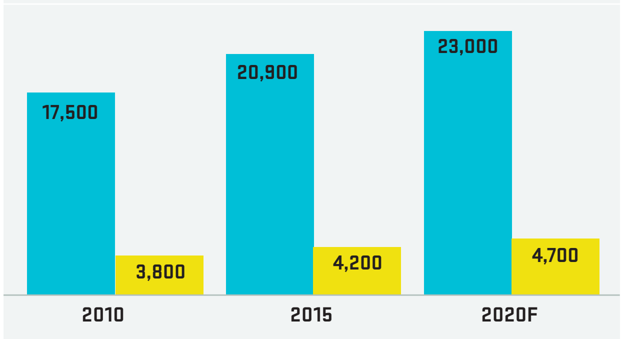


EXHIBIT 7-8: PERCENT CHANGE
Communication Arts Job Growth

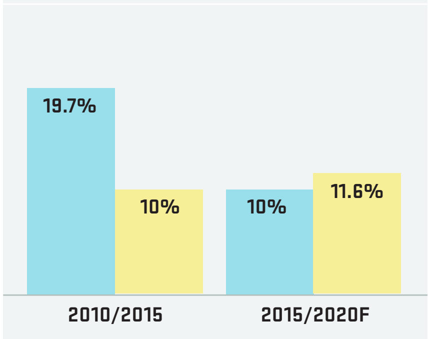


EXHIBIT 7-9: ECONOMIC CONTRIBUTION OF THE COMMUNICATION ARTS INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	2,271	654	2,925
Jobs	20,900	4,200	25,100
Labor Income ($ millions)	2.1	0.3	2.4
Nonemployer establishments, 2014	28,246	9,034	37,280
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ millions)	7.0	1.2	8.2
Total Jobs	36,700	6,900	43,600
Total Labor Income ($ millions)	2.9	0.5	3.4
Total Taxes ($ millions)	265.9	43.3	309.2

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

DIGITAL MEDIA

The digital media industry in the Los Angeles region is closely connected to its entertainment and gaming industries. The true size of the digital media industry is difficult to calculate using publicly available data sources because there is no set of NAICS codes designed to specifically capture these activities that may be included in entertainment and publishing as well as other sectors. Software publishing is the industry that best fits this activity and is used to produce the figures below.

NAICS	Description
5112	Software publishers

EXHIBIT 7-10: NUMBER OF JOBS
Digital Media Job Growth

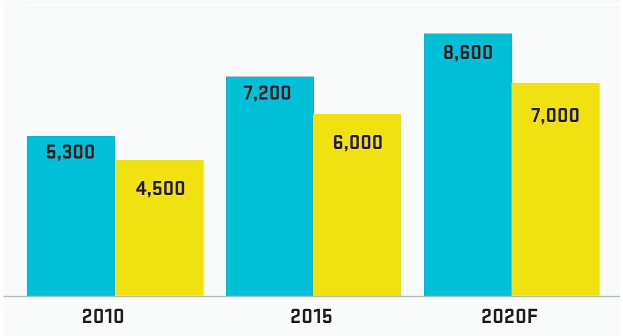


EXHIBIT 7-11: PERCENT CHANGE
Digital Media Job Growth

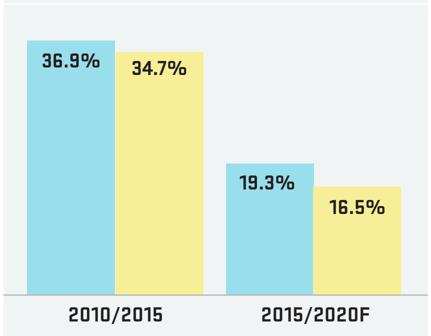


EXHIBIT 7-12: ECONOMIC CONTRIBUTION OF THE DIGITAL MEDIA INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	258	148	406
Jobs	7,200	6,000	13,200
Labor Income ($ billions)	$1.8	$0.1	1.9
Nonemployer establishments, 2014	---	---	0
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ billions)	5.2	2.9	8.1
Total Jobs	17,800	9,000	26,800
Total Labor Income ($ billions)	2.4	0.3	2.7
Total Taxes ($ millions)	210.5	56.4	266.9

Note: The U.S. Census Bureau does not provide nonemployer data for Software Publishers
Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

ENTERTAINMENT

ENTERTAINMENT

Entertainment is the cornerstone of the creative economy of the Los Angeles region. Activity related to the motion picture and sound-recording industries generates huge economic benefits for the region. The entertainment industry also strongly influences the content and design elements developed by other creative industries including digital media, fashion, toys, and publishing.

NAICS	Description
51211	Motion picture/video production
51212	Motion picture distribution
51219	Postproduction services
5122	Sound recording

NAICS	Description
515112	Radio stations
515120	Television broadcasting
5152	Cable broadcasting

EXHIBIT 7-13: NUMBER OF JOBS
Entertainment Job Growth

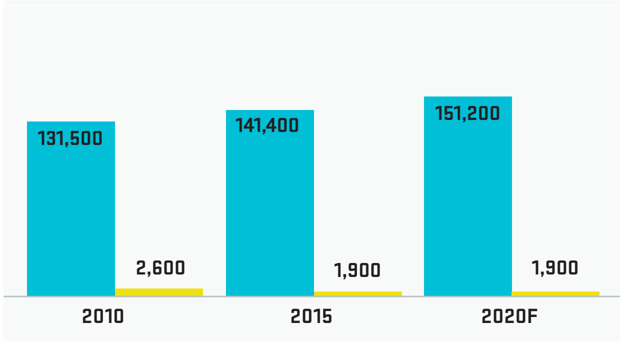


EXHIBIT 7-14: PERCENT CHANGE
Entertainment Job Growth

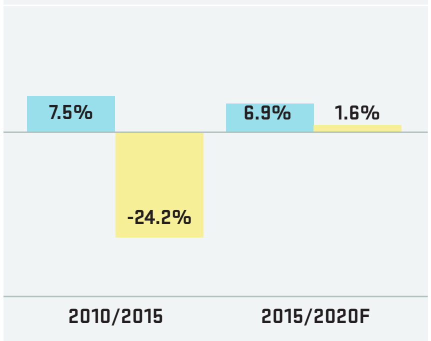


EXHIBIT 7-15: ECONOMIC CONTRIBUTION OF THE ENTERTAINMENT INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	6,823	241	7,064
Jobs	141,400	1,900	143,300
Labor Income ($ billions)	15.7	0.1	15.8
Nonemployer establishments, 2014	20,867	1,516	22,383
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ billions)	$90.0	1.4	91.4
Total Jobs	248,100	3,700	251,800
Total Labor Income ($ billions)	21.7	0.3	22.0
Total Taxes ($ millions)	3,065.9	30.4	3,096.3

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

FASHION

Apparel design, manufacturing, and wholesaling make significant contributions to the Los Angeles regional economy. The many apparel design and merchandizing schools that are located in the region attract talented students from all over the world. Fashion is also closely linked to the entertainment industry and the region's thriving art scene.

NAICS	Description	NAICS	Description
313	Textile mills manufacturing	316992	Women's handbag manufacturing
315	Apparel manufacturing	32562	Cosmetics manufacturing
4243	Apparel wholesaling	33991	Jewelry manufacturing
3162	Footwear manufacturing	42394	Jewelry wholesaling
42434	Footwear wholesaling	54149	Other specialized design services

EXHIBIT 7-16: NUMBER OF JOBS
Fashion Industry Job Growth

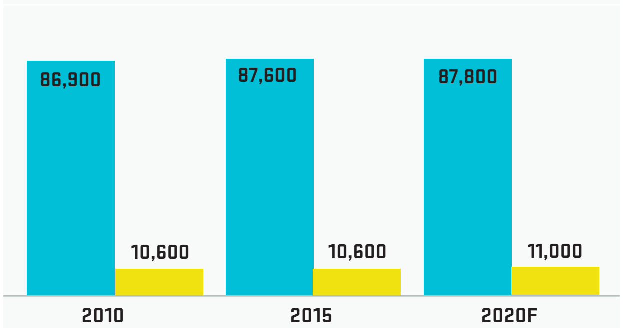


EXHIBIT 7-17: PERCENT CHANGE
Fashion Industry Job Growth

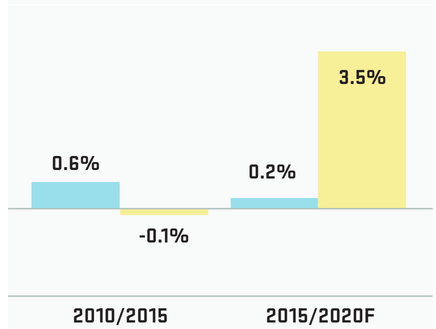


EXHIBIT 7-18: ECONOMIC CONTRIBUTION OF THE FASHION INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	6,678	694	7,372
Jobs	87,600	10,600	98,200
Labor Income ($ billions)	3.8	0.6	4.4
Nonemployer establishments, 2014	6,783	1,415	8,198
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ billions)	26.8	3.8	30.6
Total Jobs	138,600	17,500	156,100
Total Labor Income ($ billions)	6.8	1.0	7.8
Total Taxes ($ millions)	1,882.2	259.6	2,141.8

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

FURNITURE/ DECORATIVE ARTS

FURNITURE AND DECORATIVE ARTS

This industry group includes firms that manufacture, warehouse, import, and export furniture. It also includes textiles mills (sheets, towels, and fabric window treatments), and china and pottery producers. The Los Angeles region is also home to hundreds of small artisans who produce handcrafted and one-of-a-kind pieces.

NAICS	Description	NAICS	Description
314	Textiles mills manufacturing	327111	China plumbing fixtures, China, earthenware manufacturing
337	Furniture manufacturing	327112	Other China, fine earthenware, pottery manufacturing
4232	Furniture wholesaling	327212	Pressed, blown glass, glassware manufacturing
33512	Electric lighting fixtures	327999	Other miscellaneous nonmetallic mineral product manufacturing

EXHIBIT 7-19: NUMBER OF JOBS
Furniture and Decorative Arts Job Growth

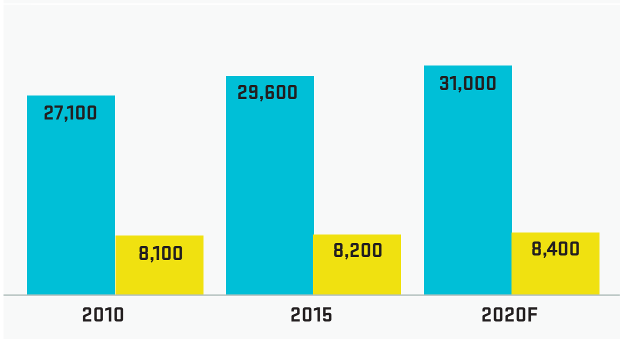


EXHIBIT 7-20: PERCENT CHANGE
Furniture and Decorative Job Growth

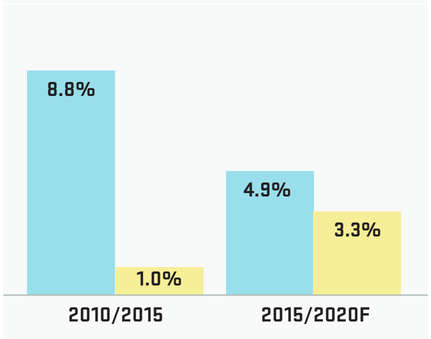


EXHIBIT 7-21: ECONOMIC CONTRIBUTION OF THE FURNITURE AND DECORATIVE ARTS INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	1,603	487	2,090
Jobs	29,600	8,200	37,800
Labor Income ($ billions)	1.4	0.7	2.1
Nonemployer establishments, 2014	1,634	504	2,138
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ billions)	9.3	2.8	12.1
Total Jobs	45,900	13,500	59,400
Total Labor Income ($ billions)	2.3	1.0	3.3
Total Taxes ($ millions)	534.3	141.0	675.3

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

INDUSTRIAL DESIGN SERVICES

INDUSTRIAL DESIGN SERVICES

Industrial designers develop the concepts for manufactured products such as cars, home appliances, and mobile devices. The figures below reflect design firms that serve as outside contractors or independent consultants to manufacturers and construction firms. However, many industrial designers are employees of companies that produce and sell a wide variety of consumer products. The data in this report capture those working in creative industries like apparel or furniture manufacturing but do not include individuals working in other industries that require designers to develop their products. Thus, the real industrial design base in the region is almost certainly larger than shown.

NAICS	Description
54142	Industrial design services

EXHIBIT 7-22: NUMBER OF JOBS
Industrial Design Services Job Growth

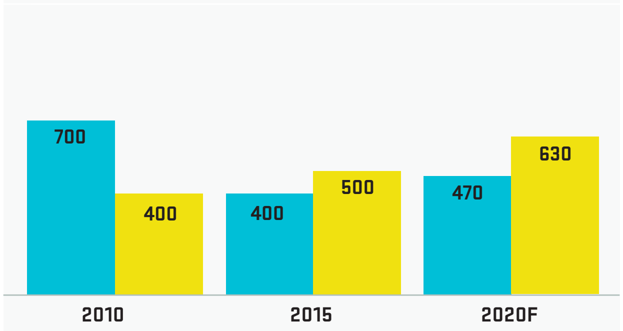


EXHIBIT 7-23: PERCENT CHANGE
Industrial Design Services Job Growth

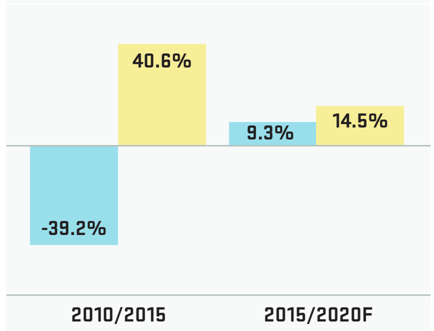


EXHIBIT 7-24: ECONOMIC CONTRIBUTION OF THE INDUSTRIAL DESIGN SERVICES INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	111	51	162
Jobs	400	500	900
Labor Income ($ millions)	23.8	49.3	73.1
Nonemployer establishments, 2014	---	---	0
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ millions)	71.1	98.3	169.4
Total Jobs	600	800	1,400
Total Labor Income ($ millions)	33.0	65.6	98.6
Total Taxes ($ millions)	3.4	5.7	9.1

Note: The U.S. Census Bureau does not provide nonemployer data for Industrial Design Services
Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

PUBLISHING AND PRINTING

The publishing and printing sector includes two distinct functions. Publishers produce and disseminate literature, artwork, or information through books, newspapers and periodicals, directories and mailing lists, greeting cards, and other materials. Printers engage in printing text and images on paper, metal, glass, or apparel using traditional and digital methods. This sector also includes libraries and archives, and internet publishing.

NAICS	Description
3231	Printing and support activities
424920	Book, periodical, newspaper wholesalers
511110	Newspaper publishers
511120	Periodical publishers
511130	Book publishers
511191	Greeting card publishers
511199	All other publishers
519120	Libraries and archives
519130	Internet publishing and broadcasting

EXHIBIT 7-25: NUMBER OF JOBS
Publishing and Printing Job Growth

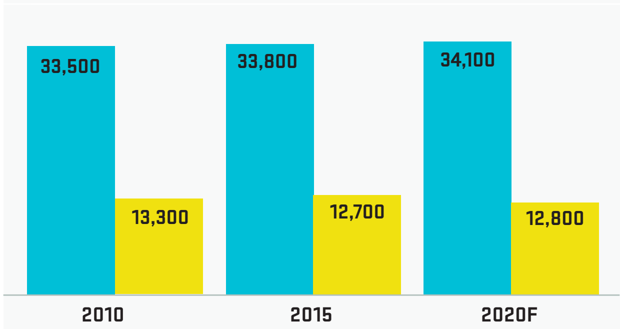


EXHIBIT 7-26: PERCENT CHANGE
Publishing and Printing Job Growth

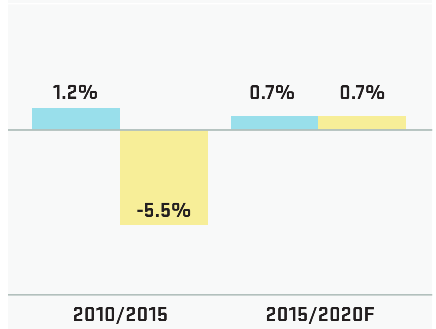


EXHIBIT 7-27: ECONOMIC CONTRIBUTION OF THE PUBLISHING AND PRINTING INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	2,055	767	2,822
Jobs	33,800	12,700	46,500
Labor Income ($ billions)	2.6	0.8	3.4
Nonemployer establishments, 2014	4,298	1,424	5,722
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ billions)	16.4	4.8	21.2
Total Jobs	76,000	24,100	100,100
Total Labor Income ($ billions)	5.0	1.5	6.5
Total Taxes ($ millions)	529.1	147.5	676.6

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

TOYS

The job numbers may be modest, but the Los Angeles region is a major force in the toy industry. Much of the actual manufacturing of toys takes place outside the region but most design and marketing functions have been retained locally because of the creative talent pool and supportive training programs at nearby educational institutions. The resident toy industry also benefits from its close ties to the area's entertainment industry through licensing agreements with the major film studios.

NAICS	**Description**
33993	Toy manufacturing
42392	Toy wholesaling

EXHIBIT 7-28: NUMBER OF JOBS
Toy Industry Job Growth

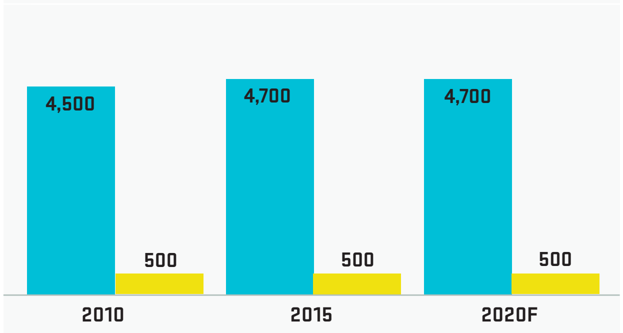


EXHIBIT 7-29: PERCENT CHANGE
Toy Industry Job Growth

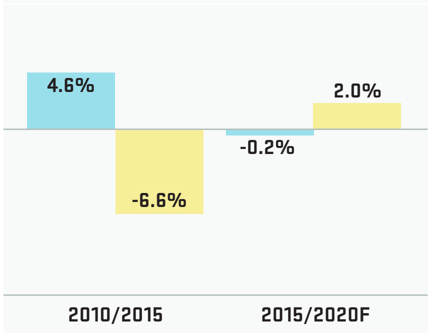


EXHIBIT 7-30: ECONOMIC CONTRIBUTION OF THE TOY INDUSTRY, 2015			
DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	235	48	283
Jobs	4,700	500	5,200
Labor Income ($ millions)	448.7	36.0	484.7
Nonemployer establishments, 2014	393	115	508
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ billions)	2.1	0.2	2.3
Total Jobs	9,100	900	10,000
Total Labor Income ($ millions)	701.2	61.6	762.8
Total Taxes ($ millions)	189.3	19.7	209.0

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

VISUAL AND PERFORMING ARTS PROVIDERS

The Los Angeles region is home to an impressive number of internationally renowned arts institutions, world-class symphonies, opera and ballet companies, and theater troupes, many of which are housed in concert halls and theaters that are works of art in their own right. Activities in this sector include theater and dance companies, musical groups, other performing arts companies and museums, as well as independent artists, writers, entertainers, and their agents and managers. Many of these firms are nonprofit organizations.

NAICS	Description	NAICS	Description
71111	Theater companies	71141	Agents and managers of artists, etc.
71112	Dance companies	71151	Independent artists, writers, etc.
71113	Musical groups	71211	Museums
71119	Other performing arts companies	339992	Musical instrument manufacturing

EXHIBIT 7-31: NUMBER OF JOBS
Visual and Performing Arts Job Growth

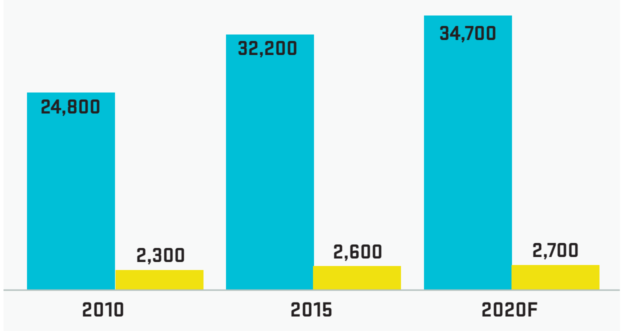


EXHIBIT 7-32: PERCENT CHANGE
Visual and Performing Arts Job Growth

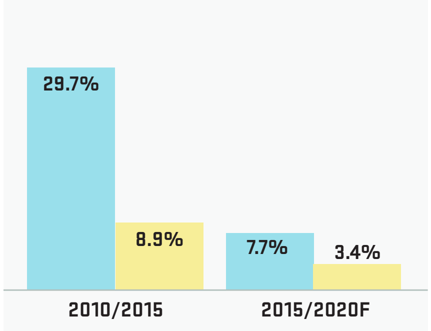


EXHIBIT 7-33: ECONOMIC CONTRIBUTION OF THE VISUAL AND PERFORMING ARTS INDUSTRY, 2015

DIRECT EFFECTS	Los Angeles County	Orange County	Total
Establishments	9,706	349	10,055
Jobs	32,200	2,600	34,800
Labor Income ($ billions)	6.1	0.1	6.2
Nonemployer establishments, 2014	81,437	9,647	91,084
TOTAL EFFECTS (DIRECT, INDIRECT, INDUCED)			
Output ($ billions)	9.9	0.5	10.4
Total Jobs	65,300	3,700	69,000
Total Labor Income ($ billions)	7.8	0.2	8.0
Total Taxes ($ millions)	604.7	18.0	622.7

Source: Bureau of Labor Statistics, U.S. Census, Estimates by LAEDC IAE

8

OCCUPATIONS IN THE CREATIVE ECONOMY

EMPLOYMENT

There are two ways to think about employment in the creative economy: individuals who work in a creative industry and individuals working in creative occupations. Up to this point, we have concentrated on the creative industries. These are the firms that produce and distribute cultural, consumer, and commercial goods and services. This section turns from industry analysis to an examination of creative occupations. Many of these occupations are found within the creative industries, but they are also present in significant numbers in industries that are outside the designated creative sector.

The Bureau of Labor Statistics collects data pertaining to occupations that make it possible to identify and measure creative occupations throughout the economy. It can also shed light on the extent to which creative industries employ people in functions outside of creative occupations. The occupational data used in this report are based on the Standard Occupational Classification (SOC) system. Of the 820 detailed occupational codes listed in the SOC system, 775 were included in the data set for the Los Angeles region, and of those, 76 have been identified as creative.[10]

These 76 creative occupations can be found across a wide array of organizational functions. For example, within the major group, management occupations, creative occupations include advertising, marketing, and public relations managers. In technical fields, there are software developers and architects, and in production-related fields, there are tailors, cabinet makers, and engravers. One may find a marketing manager or graphic designer working in any number of industries, those identified as creative or otherwise. This illustrates the fact that creative people are often found outside of what we typically think of as the creative sectors of the economy.

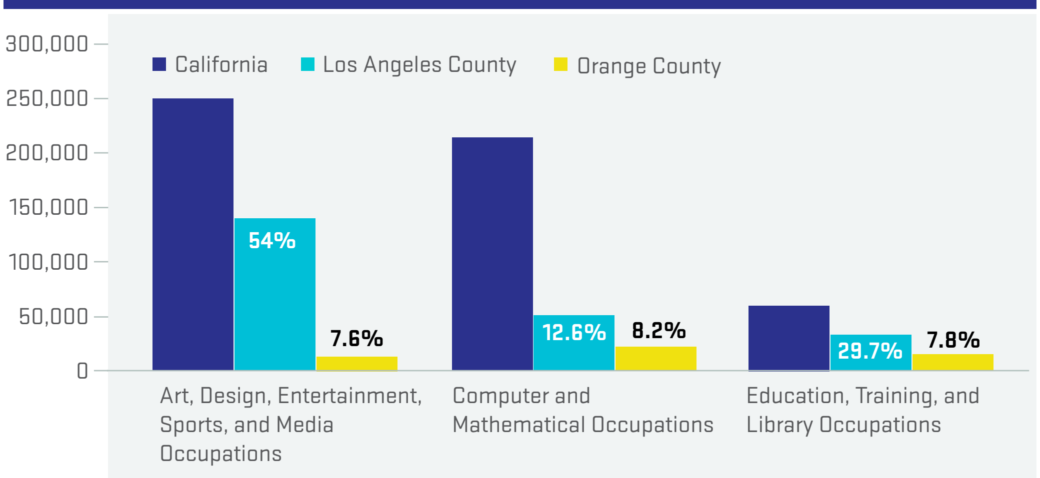
In 2015, there were 223,800 workers in Los Angeles County employed in a creative occupation and 55,000 in Orange County. These could be jobs within the defined set of creative industries described in this report or they might be in a non-creative industry. This represents 5.5 percent of total occupation-based employment in Los Angeles County and 3.6 percent in Orange County.

In both counties, the largest share of individuals employed in creative occupations worked in art, design, entertainment, and media: 61 percent in Los Angeles County and 35 percent in Orange County for a total of 156,500 workers. Across both counties, 43,000 people worked in computer and mathematical occupations, many of whom spend their days creating animated characters for film and TV or designing video games. The next largest group of creative workers in the region were employed in education, training, and library occupations (21,400).

Individuals employed in creative occupations in California are well represented in the Los Angeles region. Comparing local employment shares relative to total state employment in each of the three largest occupation groups reveals that the share of art, design, entertainment, and media jobs in the Los Angeles region increased from 58.8 percent in 2014 to 61.6 percent in 2015, while the share of computer and mathematical jobs declined from 22.6 percent to 20.8 percent, possibly due to the strong gravitational pull of the Bay Area's tech sector.

Exhibit 8-1 below shows Los Angeles and Orange counties' creative employment as a percentage of total California employment in the three largest occupational groups. In total, 34.2 percent of persons working in creative occupations in California are located in Los Angeles County and 8.4 percent are in Orange County. By major occupational group, 54 percent of the state's arts, design, entertainment, sports, and media jobs are located in Los Angeles County with an additional 7.6 percent in Orange County. In contrast, computer and mathematical occupations are concentrated in the Bay Area with only 20.8 percent of employment in those occupations located in the Los Angeles-Orange County region, while 37.5 percent of the state's education, training, and library-related jobs are based in the Los Angeles region.

EXHIBIT 8-1:
CREATIVE EMPLOYMENT IN THE THREE LARGEST OCCUPATIONAL GROUPS; NUMBER OF WORKERS AND AS A PERCENTAGE OF THE CALIFORNIA TOTAL, 2015



Note:
Please see Exhibit A-9 in the appendix for details on employment shares by occupation.

See Exhibit A-4 in the appendix for a detailed list of creative occupations, projected job openings over the next five years, educational requirements, and median wages.

That numerous creative occupations may be found across so many industries suggests the importance of creativity throughout the economy as a highly valued attribute essential to the success of many different kinds of firms and business activities. The further implication is that it is in the region's economic interest to maintain, nurture, and grow its deep pool of creative talent.

HOW MUCH DO CREATIVE WORKERS EARN?

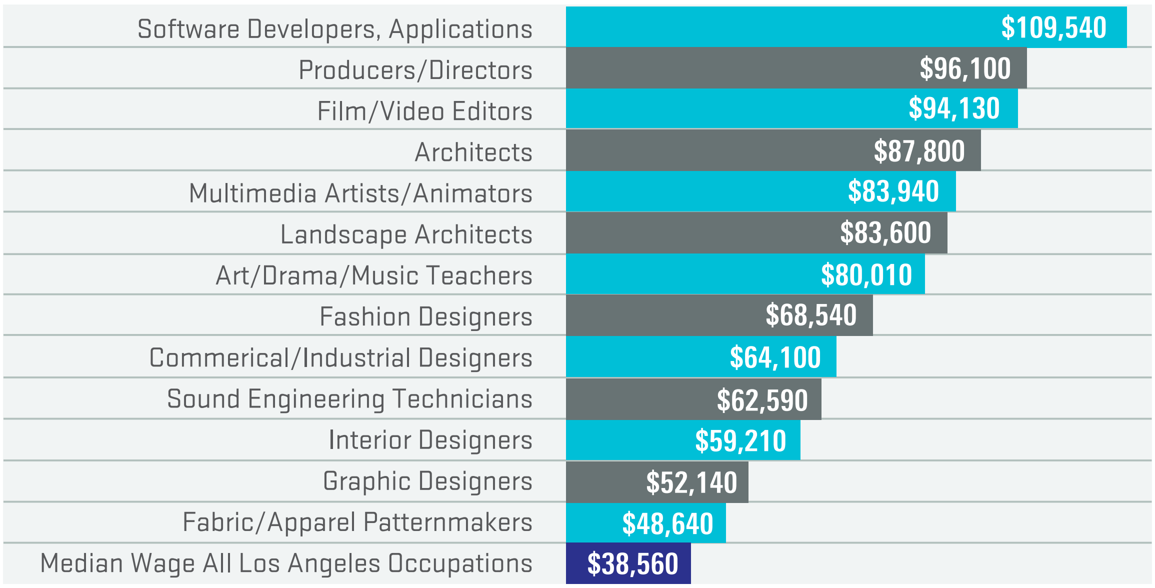
Creativity is a highly valued and recognized professional attribute. Along with the ability to collaborate with coworkers and to communicate effectively, creativity is a sought-after quality in a prospective employee. The salaries received by many creative individuals working in the Los Angeles region bear this out.

In Los Angeles County in 2015, the creative occupation receiving the highest annual median wage was marketing managers earning $139,080. The lowest was hand sewers at $22,160. In Orange County, public relations and fundraising managers earned the highest median wage at $137,230; the lowest median wage ($22,630) was earned by hand sewers.

The median wage across all occupations in Los Angeles County was $38,560 in 2015. Out of the 76 creative occupations analyzed in this report, 64 had a median annual wage greater than the county-wide median.[11] In Orange County, the median wage across all occupations was slightly higher at $39,070 with 55 creative occupations exceeding that threshold (wage data for seven occupations was unavailable).[12]

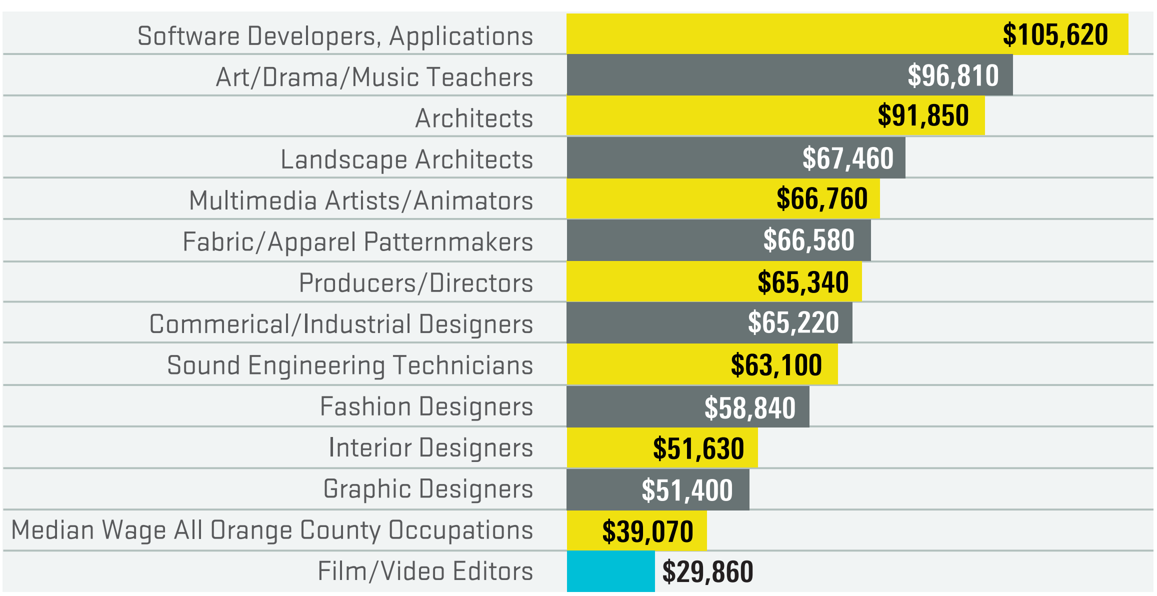
The occupations listed in the accompanying charts and tables in this section were chosen because they align closely with the creative industries defined in this report. Between 2014 and 2015, there was a great deal of variation in median annual wage growth, but compared with the change between 2013 and 2014, more occupations are showing wage gains. Overall, the median annual wage across all occupations increased by 1.2 percent after rising by just 0.8 percent in 2014. Wage gains for creative occupations were, for the most part, much stronger than the countywide median in 2015.

EXHIBIT 8-2:
SELECTED ANNUAL MEDIAN WAGES FOR CREATIVE OCCUPATIONS IN LOS ANGELES COUNTY, 2015



Source: Bureau of Labor Statistics, OES

EXHIBIT 8-3:
SELECTED ANNUAL MEDIAN WAGES FOR CREATIVE OCCUPATIONS IN ORANGE COUNTY, 2015



Source: Bureau of Labor Statistics, OES

Throughout the current economic expansion, the lack of wage growth across many industries and occupations has been a concern. Lingering slack in the labor markets (low labor force participation and underemployment) has acted as a check on wage growth. Now that the economy is at or near full employment, several measures of income growth indicate more workers can expect to see a bump in their paychecks. Competition among firms for skilled employees is becoming more intense, putting upward pressure on wages, and in many states and municipalities, higher minimum wage laws are increasing pay for low-wage earners.

The tables below show employment and median wage changes for selected creative occupations in 2015 compared with 2014. The median annual wage moved higher for most occupations in Los Angeles County, but in Orange County less than half showed an increase. There are many reasons why some of these occupations may have suffered a decline in wages. The first is a shift from wage and salary employment to independent contractors. Some of these occupations may also be concentrated in industries that are declining or are in the process of transforming through technological change. Declining wages can also be attributed to trends in the broader economy, such as low levels of new home building thereby decreasing demand for landscape architects since most new homebuilding is multifamily. Another factor that reflects trends in the labor markets at large, is that more people in creative occupations may be working part-time, which would certainly cause a decline in median annual wage.

EXHIBIT 8-4: LOS ANGELES COUNTY EMPLOYMENT AND EARNINGS FOR SELECTED CREATIVE OCCUPATIONS, 2014 AND 2015

	Employment			Median Annual Wage		
	2014	2015	# Change	2014	2015	% Change
Architects	3,280	3,860	**580**	$81,080	$87,800	**8.3%**
Art/Drama/Music Teachers	4,050	4,660	**610**	$74,680	$80,010	**7.1%**
Commercial/Industrial Designers	1,510	1,730	**220**	$59,300	$64,100	**8.1%**
Fabric/Apparel Patternmakers	1,670	1,280	**-390**	$46,680	$48,640	**4.2%**
Fashion Designers	4,130	4,020	**-110**	$67,080	$68,540	**2.2%**
Film/Video Editors	8,810	10,000	**1,190**	$85,590	$94,130	**10.0%**
Graphic Designers	9,600	10,010	**410**	$51,390	$52,140	**1.5%**
Interior Designers	1,500	2,170	**670**	$53,220	$59,210	**11.3%**
Landscape Architects	170	340	**170**	$92,700	$83,600	**-9.8%**
Multimedia Artists/Animators	5,920	5,830	**-90**	$80,520	$83,940	**4.2%**
Producers/Directors	19,560	19,560	**0**	$101,480	$96,100	**-5.3%**
Software Developers, Applications	16,010	15,220	**-790**	$102,310	$109,540	**7.1%**
Sound Engineering Technicians	3,070	3,100	**30**	$57,790	$62,590	**8.3%**

Source: Bureau of Labor Statistics, OES

EXHIBIT 8-5: ORANGE COUNTY EMPLOYMENT AND EARNINGS FOR SELECTED CREATIVE OCCUPATIONS, 2014 AND 2015

	Employment			Median Annual Wage		
	2014	2015	# Change	2014	2015	% Change
Architects	970	1,270	**300**	$88,330	$91,850	**4.0%**
Art/Drama/Music Teachers	1,230	1,250	**20**	$105,150	$96,810	**-7.9%**
Commercial/Industrial Designers	560	520	**-40**	$68,640	$65,220	**-5.0%**
Fabric/Apparel Patternmakers	110	150	**40**	$59,220	$66,580	**12.4%**
Fashion Designers	520	600	**80**	$62,600	$58,840	**-6.0%**
Film/Video Editors	150	150	**0**	$33,800	$29,860	**-11.7%**
Graphic Designers	3,290	3,300	**10**	$50,100	$51,400	**2.6%**
Interior Designers	930	1,020	**90**	$58,510	$51,630	**-11.8%**
Landscape Architects	860	1,010	**150**	$68,540	$67,460	**-1.6%**
Multimedia Artists/Animators	480	700	**220**	$73,680	$66,760	**-9.4%**
Producers/Directors	590	580	**-10**	$62,360	$65,340	**4.8%**
Software Developers, Applications	9,360	9,900	**540**	$101,620	$105,620	**3.6%**
Sound Engineering Technicians	250	240	**-10**	$54,990	$63,100	**14.7%**

Source: Bureau of Labor Statistics, OES

LOCATION QUOTIENTS IN THE LOS ANGELES REGION

A location quotient (LQ) can be used to quantify the concentration of a particular industry, industry cluster, occupation, or demographic group in a region and compare it with the nation. It reveals what makes a region unique.

An LQ of 1.0 for an occupation means that a region has the same (or average) concentration of that occupation as the nation as a whole. If the LQ of an occupation is above 1.0, the region has a higher-than-average concentration of that occupation. Higher-than-average LQs for a given occupation or industry suggest a competitive advantage for that region with respect to that occupation or industry as compared to the nation and other regions.

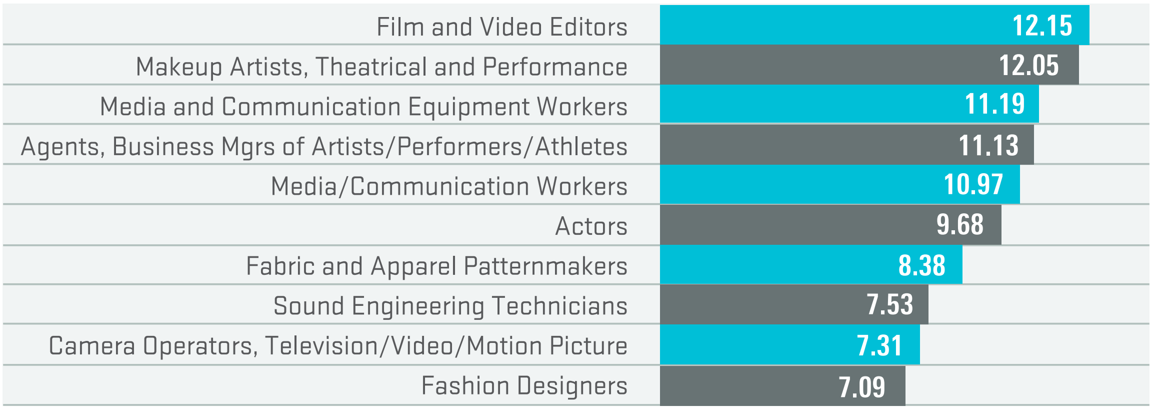
As indicated in the figures below, the Los Angeles region has high LQs in a number of creative occupations. In fact, the ten occupations in Los Angeles County with the highest LQs were all creative occupations. Orange County's profile was quite different where only one of the top ten occupations by LQ was creative: landscape architects. The highest LQs in Orange County were for occupations in the construction trades and technology.

10
The list of creative occupations used in this report draws on the work of Ann Markusen et al. (2008). Defining the Creative Economy: Industry and Occupation Approaches. Economic Development Quarterly, 22: 24–25.

11
In Los Angeles County, wage data was unavailable for actors, dancers, musicians and singers, and writers and authors.

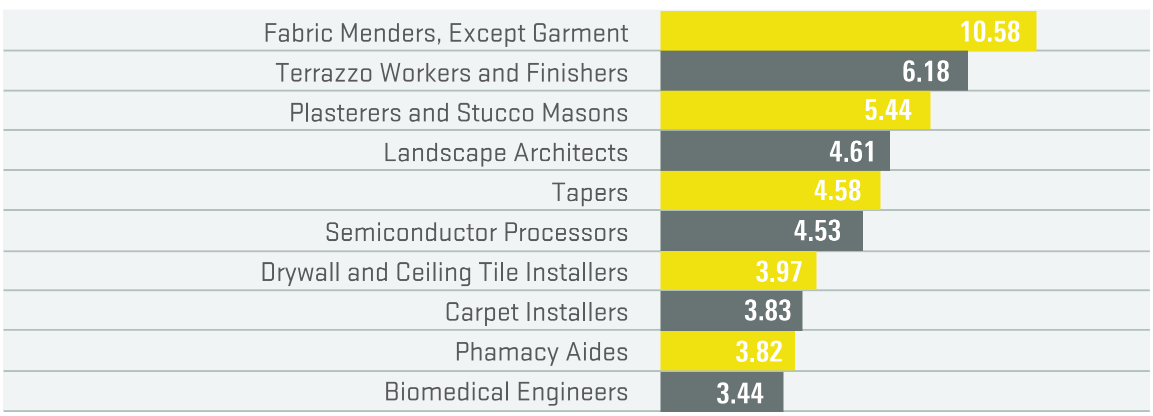
12
In Orange County, wage data was unavailable for agents and business managers of artists, performers and athletes; set and exhibit designers; actors; dancers; musicians and singers; photographers; and etchers and engravers.

EXHIBIT 8-6:
OCCUPATIONS WITH THE HIGHEST LOCATION QUOTIENTS IN LOS ANGELES COUNTY



Source: Bureau of Labor Statistics, OES

XHIBIT 8-7:
OCCUPATIONS WITH THE HIGHEST LOCATION QUOTIENTS IN ORANGE COUNTY



Source: Bureau of Labor Statistics, OES

9

NONPROFIT SECTOR OF THE CREATIVE ECONOMY

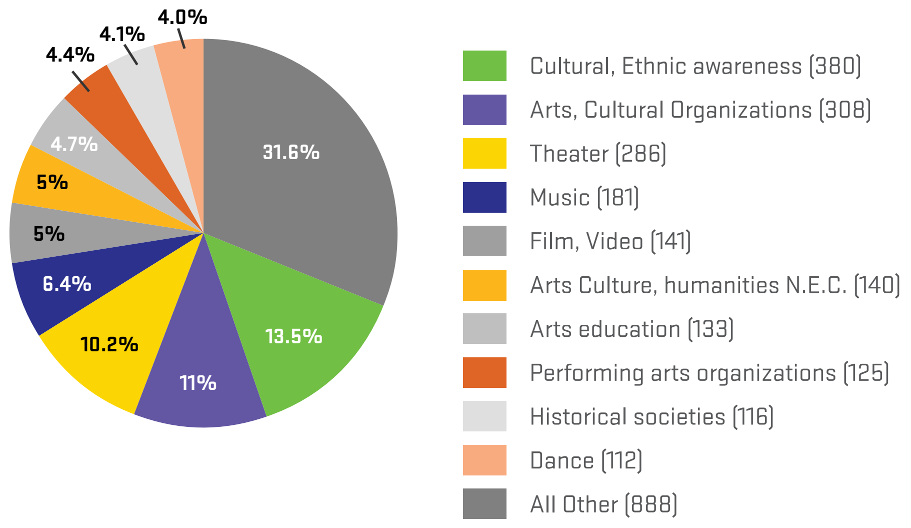
The nonprofit sector plays an indispensable role in the economy as a major source of employment and income. Many nonprofit organizations are run similarly to for-profit entities and require workers with specialized skills to ensure the smooth running of their operations. Nonprofits also purchase goods and services from third-party suppliers. Like their for-profit counterparts, nonprofits also need computers, utilities, and office supplies. This generates revenues and creates jobs for the companies who supply goods and services to nonprofit organizations. In addition to paid workers, nonprofits also utilize unpaid volunteers who annually contribute millions of hours of their time and expertise, both of which have economic value.

Nonprofits, as defined by U.S. tax law, are "organizations for charitable or mutual benefit purposes." Nonprofits are not restricted in how much income they can generate, which can be substantial in the case of a concert hall, museum, or hospital, but rather in how that income is distributed. Profits cannot be paid to owners or anyone else associated with the organization but must instead be devoted to the tax-exempt purpose of the organization.

The need for nonprofits grows from the limitations of the private and public sectors. In the case of the private sector, society may demand a good or service that a private firm cannot profitably provide, quite often because the desired good or service is a collective good. In the public sector, the provision of certain goods or services may lack the support of the majority of the people. Therefore, nonprofits are the means by which citizens who want more of some collective good or service, such as concert halls or after-school arts education, can supply that need.

EXHIBIT 9-1:
NUMBER OF ORGANIZATIONS IN SAMPLE AND PERCENTAGE OF TOTAL IN LOS ANGELES COUNTY

TOTAL: 2,180 ORGANIZATIONS



This section describes the nonprofit sector in the greater Los Angeles region using data from the IRS Statistics of Income (SOI) Program (see note SOI Data on page 40). While these data show a rich and deep ecosystem of arts-related nonprofits in the region, these figures are based on a sample of nonprofits and are not meant to represent the sector in its entirety. As such, the number of organizations shown here understates the size and contribution of arts-related nonprofits in Los Angeles and Orange counties.

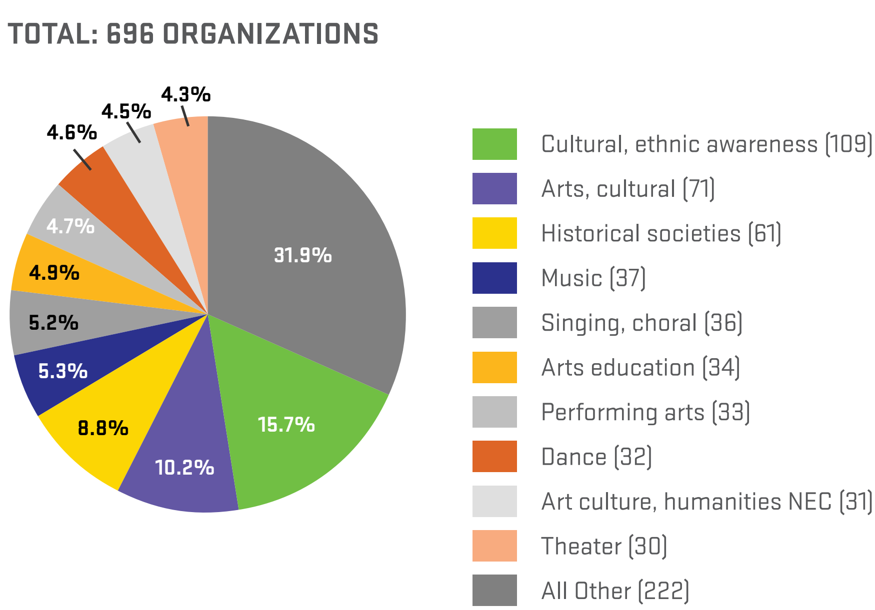
The SOI data set compiled in 2016 contained a total of 2,180 nonprofit organizations in Los Angeles County that were classified as arts, culture, and humanities organizations representing over 40 different types of organizations. The largest segments of the nonprofit sector were organizations that promote cultural and ethnic awareness (380 organizations or 13.5 percent of the total)[13]; arts and cultural organizations (308, 11.0 percent); theater (286, 10.2 percent); and music (181, 6.4 percent).
Nonprofit arts education also has a significant presence in Los Angeles County. Based on the SOI sample, there were 133 organizations devoted to arts education along with 21 nonprofit performing schools.

In Orange County, there were 696 arts-related organizations listed in the SOI sample. The largest sector was also cultural and ethnic awareness (109 organizations or 15.7 percent of the total); arts and cultural organizations (71, 10.2 percent); historical societies (61, 8.8 percent); and music (37, 5.3 percent).

In addition to the number and type of organizations present in a region, the SOI data also provide information pertaining to the value of assets, revenue, and income (although not in all cases) for each organization. The total value of assets held by nonprofits in Los Angeles County (based on the available sample) amounted to $7.3 billion. Art museums held nearly 31 percent of the total with a reported asset value of $2.3 billion. The next largest category was history museums with 15.4 percent ($1.1 billion), followed by cultural and ethnic awareness organizations with 6.6 percent ($0.5 billion).

Total income reported by arts-related nonprofits in Los Angeles County was $2.5 billion with the largest share (16.0 percent) earned by art museums,

EXHIBIT 8-6:
OCCUPATIONS WITH THE HIGHEST LOCATION QUOTIENTS IN LOS ANGELES COUNTY



while arts education programs earned the largest share of the county's arts-related nonprofit revenues – 13.0 percent or $231 million.[14]

In Orange County, the arts-related nonprofit sector reported assets valued at $987 million with almost 48 percent ($473 million) of the total owned by performing arts centers. Performing arts centers in Orange County also earned the highest shares of income and revenues – 54 percent of the $492 million of total income reported by arts-related nonprofits in the county and 31 percent of reported revenues of $282 million. After performing arts centers, the next largest shares of assets, income, and revenues were reported by arts and cultural organizations and symphony orchestras.

Creative people, as well as many others, want diverse cultural amenities. High concentrations of cultural workers and attractions make an area more appealing by improving the quality of life for residents and draw visitors to the area. Additionally, the educational and outreach services provided by nonprofit arts organizations play an important role in training the next generation of creative individuals.

Please see Exhibits 9-5 and 9-6 for more detail

13
This category includes organizations dedicated to the study, preservation and/or dissemination of the history and culture of ethnic groups, while excluding organizations whose primary mission is the social or economic advancement of these groups (www.humanitiesindicators.org).

14
Revenue is the total amount of money received by the organization. Income is the amount of money retained by the organization upon paying expenses. Revenues come from donations, membership dues, program fees, fundraising events, grants, and investment activity.

EXHIBIT 9-3: ARTS - RELATED NONPROFITS AND REGIONAL SHARES, 2016					
BASED ON SAMPLE	California	Los Angeles County	Los Angeles County Share	Orange County	Orange County Share
Number of Organizations	9,770	2,180	22.3%	696	7.1%
Reported Assets ($ billions)	16.7	7.3	43.7%	1.0	6.0%
Reported Income ($ billions)	7.8	2.5	32.1%	0.5	6.4%
Reported Revenue ($ billions)	4.5	1.8	40.0%	0.3	6.7%

Source: IRS SOI Statistics

EXHIBIT 9-4: COMPARISON OF NONPROFIT SECTOR FIGURES, OTIS 2015 REPORT VS. 2016						
	Los Angeles County			Orange County		
BASED ON SAMPLE	2015	2016	% Change	2015	2016	% Change
Number of Organizations	2,157	2,180	1.1%	609	696	14.3%
Reported Assets ($ billions)	6.5	7.3	12.3%	0.9	1.0	11.1%
Reported Income ($ billions)	2.2	2.5	13.6%	0.3	0.5	66.7%
Reported Revenue ($ billions)	1.5	1.8	20.0%	0.2	0.3	50.0%

Source: IRS SOI Statistics

Note on Statistics of income (SOI) Data

Information on nonprofits is limited, but the IRS publishes some data on tax-exempt organizations as part of its Statistics of Income (SOI) program. Although the IRS offers the most comprehensive and standardized publically available data on tax-exempt organizations, there are significant limitations. The SOI files are compiled annually using information gathered from the Form 990 filed by nonprofit organizations. The SOI files include all 501(c)(3) organizations with $30 million or more in assets, all organizations filing under sections 502(c)(4) through 501(c)(9) with $10 million or more in assets, and a sample of a few thousand smaller organizations per year that are selected to represent all nonprofit organizations.

EXHIBIT 9-5: LOS ANGELES COUNTY ARTS-RELATED NONPROFIT ORGANIZATIONS					
NTEE Code	**DESCRIPTION**	Number of Organizations	Asset Amount ($1,000s)	Income Amount ($1,000s)	Revenue Amount ($1,000s)
A01	Alliance/advocacy organizations	15	1,614	5,392	5,125
A02	Management and technical assistance	6	1	47	31
A03	Professional societies, associations	18	520	300	242
A05	Research institutes and/or public policy analysis	4	1,343	245	129
A11	Single organization support	38	475,459	146,758	87,387
A12	Fundraising and/or fund distribution	49	442,455	14,629	12,559
A19	Nonmonetary support N.E.C.*	14	1,547	5,716	5,703
A20	Arts, cultural organizations – multipurpose	308	188,775	43,396	37,380
A23	Cultural, ethnic awareness	380	479,657	206,230	58,437
A25	Arts education	133	284,617	275,183	230,523
A26	Arts council/agency	17	13,109	4,610	3,982
A27	Community celebrations	3	2,039	5,706	5,706
A30	Media, communications organizations	40	23,169	26,052	22,819
A31	Film, video	141	137,143	108,614	105,525
A32	Television	20	33,917	32,289	27,102
A33	Printing, publishing	39	15,882	9,697	8,170
A34	Radio	18	35,826	32,134	31,510
A40	Visual arts organizations	60	10,188	7,749	7,200
A50	Museums, museum activities	53	387,596	154,344	145,618
A51	Art museums	45	2,255,628	393,328	183,058
A52	Children's museums	3	23,369	6,290	4,937
A54	History museums	61	1,124,222	241,336	161,904
A56	Natural history, natural science museums	4	10,820	2,047	1,578
A57	Science and technology museums	8	117,813	58,529	36,645
A60	Performing arts organizations	125	24,489	19,244	18,564
A61	Performing arts centers	25	92,763	59,982	57,221
A62	Dance	112	5,705	8,073	7,703
A63	Ballet	20	1,124	8,438	8,060
A65	Theater	286	163,264	139,104	131,509
A68	Music	181	36,149	33,016	23,561
A69	Symphony orchestras	48	329,159	193,538	185,783
A6A	Opera	25	80,236	44,721	43,756
A6B	Singing, choral	68	7,140	9,856	9,086
A6C	Music groups, bands, ensembles	34	948	1,285	1,224
A6E	Performing arts schools	21	381,503	113,008	69,816
A70	Humanities organizations	65	17,093	9,604	7,876
A80	Historical societies, related historical activities	116	47,568	10,218	6,581
A82	Historical societies and historic preservation	21	19,600	12,129	8,533
A84	Commemorative events	23	6,903	1,695	1,108
A90	Arts service organizations and activities	23	763	2,102	1,737
A99	Arts culture and humanities N.E.C.*	140	27,243	16,984	10,689
TOTALS:		**2,810**	**7,308,360**	**2,463,618**	**1,776,080**

*Not otherwise classified
Source: IRS SOI Statistics

EXHIBIT 9-6: ORANGE COUNTY ARTS-RELATED NONPROFIT ORGANIZATIONS					
NTEE Code	DESCRIPTION	Number of Organizations	Asset Amount ($1,000s)	Income Amount ($1,000s)	Revenue Amount ($1,000s)
A01	Alliance/advocacy organizations	2	0	0	0
A02	Management and technical assistance	1	0	0	0
A03	Professional societies, associations	2	25	12	12
A11	Single organization support	12	1,617	673	508
A12	Fundraising and/or fund distribution	8	43	37	22
A20	Arts, cultural organizations – multipurpose	71	114,277	40,187	38,605
A23	Cultural, ethnic awareness	109	4,964	3,628	3,337
A25	Arts education	34	11,116	5,987	2,337
A26	Arts council/agency	6	814	807	733
A30	Media, communications organizations	8	55	91	91
A31	Film, video	14	126	904	901
A32	Television	7	20,480	16,818	16,296
A33	Printing, publishing	14	3,821	2,299	2,155
A34	Radio	2	178	620	449
A40	Visual arts organizations	10	3,534	822	727
A50	Museums, museum activities	19	89,374	26,430	24,323
A51	Art museums	5	27,904	5,243	4,158
A52	Children's museums	3	4,062	3,812	3,631
A54	History museums	15	23,269	5,584	4,298
A57	Science and technology museums	2	38,470	13,081	12,359
A60	Performing arts organizations	33	651	1,225	1,084
A61	Performing arts centers	8	473,014	266,995	88,336
A62	Dance	32	571	1,071	997
A63	Ballet	13	8,566	5,031	3,281
A65	Theater	30	74,056	29,998	21,669
A68	Music	37	953	2,273	2,190
A69	Symphony orchestras	13	42,202	31,918	25,866
A6A	Opera	3	117	584	584
A6B	Singing, choral	36	2,975	4,533	3,624
A6C	Music groups, bands, ensembles	19	137	581	403
A6E	Performing arts schools	5	54	202	202
A70	Humanities organizations	21	19,689	14,233	14,075
A80	Historical societies, related historical activities	61	16,571	5,054	3,452
A84	Commemorative events	7	209	227	227
A90	Arts service organizations and activities	3	297	98	30
A99	Arts culture and humanities N.E.C.*	31	2,795	1,333	1,298
TOTALS:		696	986,987	492,392	282,259

*Not otherwise classified
Source: IRS SOI Statistics

10

ARTS EDUCATION: K–12 AND POSTSECONDARY

ARTS EDUCATION IN THE 21ST CENTURY

Education in the arts is a necessary part of preparing students to meet the demands of the 21st century workplace. Decades of research show strong and consistent links (although research has not yet established causal proof) between high-quality arts education and a wide range of impressive educational outcomes.[15] Among these are increased student engagement, improved attendance, focused attention, heightened educational aspirations, and development of habits of mind, such as problem solving, critical and creative thinking, dealing with complexity, and integration of multiple skill sets. The arts are also linked to the development of social competencies including collaboration and teamwork skills, social tolerance, and self confidence.[16]

The challenge for K–12 educators in the Los Angeles region is to find new ways to engage a culturally diverse student body in a meaningful learning experience when students are increasingly turning to digital devices and away from teachers and texts for information and to express ideas. Research points to the success of schools that are "arts-rich." Often students who may have fallen by the wayside find themselves re-engaged in learning when their interest in film, design, or music is given an outlet for expression.

The call for more rigorous academic standards is insufficient to improve student performance without an attendant focus on developing creativity and imagination. While no one questions the necessity of mastering language, math, and science skills, a singular focus on these subjects ignores the needs of students whose talents run in a different direction. Many graduating high school seniors are products of a narrow curricula, lacking the creative and critical thinking skills needed for success in postsecondary education and the workforce. Studies have demonstrated that students who attend schools where the arts are integrated into the classroom curriculum outperform their peers who did not have an arts-integrated curriculum in math and reading.[17] Additionally, the study of the performing and the visual arts helps students "explore realities, relationships and ideas that cannot be conveyed simply in words or numbers."[18]

As stated by the Arts Policy Council[19] in its Platform in Support of the Arts:

> "To remain competitive in the global economy, America needs to reinvigorate the kind of creativity and innovation that has made this country great. To do so, we must nourish our children's creative skills. In addition to giving our children the science and math skills they need to compete in the new global context, we should also encourage the ability to think creatively that comes from a meaningful arts education..."

The arts are a vital part of the culture and life of this country and are essential to a complete education. Decades of research and experience show that a high-quality arts education may play an important part in achieving a range of educational objectives including graduating students who are college or workforce ready.

TRACKING ARTS EDUCATION IN CALIFORNIA

The California Department of Education tracks student enrollment in course subject areas. These data provide a count of students enrolled in arts-related courses in K–12 schools and the number classes that meet UC/CSU entrance requirements, but does not provide information pertaining to outcomes or the level of arts integration in California schools. The data are also limited in that they were collected on a single day in the fall of the academic year. Courses that are only offered later in the year are not included. Course enrollment totals may also duplicate counts of students (a single student may be enrolled in more than one creative course) and should not be mistaken as an official enrollment figure.

It is also important to look at this data in the context of official K–12 enrollment figures. Even though California's total population is rising, its child population is declining. According to the California Department of Finance, if current fertility and migration trends hold over the next decade (2015 to 2025), K–12 enrollment in California is projected to decline by 2.6 percent (162,700 students). Los Angeles and Orange counties are expected to experience the steepest enrollment declines in the state. In Los Angeles County, K–12 enrollment is expected to fall by nearly 107,000 students (-7.0 percent), while in Orange County, enrollment is forecast to contract by 47,000 students (-9.5 percent).

CREATIVE COURSE ENROLLMENT IN LOS ANGELES COUNTY

Total K–12 student enrollment was down by 0.8 percent in the 2014–15 academic year (AY) compared with the previous year. Nearly matching the decline in student enrollment, the number of students taking creative courses fell by just under 1.0 percent. At the same time, the number of creative courses increased by 2.0 percent, which may indicate smaller student-teacher ratios in creative courses. Looking back over the previous five academic years, the ratio of creative course enrollment to total course enrollment has increased slightly from 7.3 percent in AY2010–11 to 7.7 percent in

AY2014–15. The number of creative courses meeting UC/CSU entrance requirements increased by 5.0 percent over the year in AY2014–15 and comprised 58 percent of all creative course offerings.

Course subject areas that saw gains in student enrollment in AY2014–15 were arts, media and entertainment, computer education, dance, engineering and architecture, and manufacturing and product development (that is, courses concentrated in career development as opposed to cultural enrichment.) Art, music, and drama all experienced small declines in enrollment.

Looking at enrollment in creative subject areas by sex, the distribution between male and female students has been consistent over the last five years with females averaging just over 50 percent of creative course enrollment while accounting for 49 percent of total course enrollment. The ratio of female enrollment in creative courses was highest in dance (83.3 percent), and fashion and interior design (82.9 percent), while males held larger shares in building trades and construction (73.9 percent); engineering and architecture (70.7 percent); and computer education (63.4 percent). Clearly there is still a division along traditional gender lines in the arts and other creative subject courses .

CREATIVE COURSE ENROLLMENT IN ORANGE COUNTY

Total K–12 student enrollment in Orange County fell by 0.7 percent in AY2014–15 compared with the previous year, but creative course enrollment increased by 5.9 percent. The number of creative classes offered rose by 0.8 percent, while the number of UC/CSU eligible classes declined by 0.7 percent. Similar to Los Angeles County, male-female enrollment ratios varied by subject area by roughly the same types of courses.

15
Scheuler, Leslie (2010). Arts Education Makes a Difference in Missouri Schools. Missouri Alliance for Arts Education; See also Americans for the Arts at www.americansforthe arts.org/research and Preparing Students for the Next America, Arts Education Partnership (2013).

16
Reinvesting in Arts Education, President's Committee on the Arts and Humanities (May 2011).

17
Arts integration is the practice of using arts to create relationships between different disciplines to build skills across subjects such as math, science, history, and literature. Stated more simply, to teach through and with the arts.

18
Reinvesting in Arts Education, President's Committee on the Arts and Humanities (May 2011)

19
The Arts Policy Council was created by President Barack Obama during his 2008 campaign and is made up of artists, cultural leaders, educators, and advocates to advise on policy matters related to the arts.

EXHIBIT 10-1: LOS ANGELES COUNTY K-12 CREATIVE COURSE ENROLLMENT BY SEX

COURSE SUBJECT AREA	ACADEMIC YEAR														
	2014–2015			2013–2014			2012–2013			2011–20112			2010–2011		
	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total
Agriculture and Natural Resources	741	878	1,619	1,037	1,320	2,357	---	---	---	---	---	---	---	---	---
Art	76,271	76,704	152,975	76,324	78,162	154,486	73,532	75,010	148,542	72,326	73,738	146,064	79,573	81,478	161,051
Arts, Media, and Entertainment	18,687	23,049	41,736	18,004	21,878	39,882	17,063	20,407	37,470	16,305	20,117	36,422	10,532	12,291	22,823
Building Trades and Construction	1,245	3,517	4,762	1,528	3,965	5,493	1,619	4,337	5,956	1,114	3,691	4,805	1,514	3,692	5,206
Computer Education	266	461	727	213	433	646	262	499	761	343	668	1,011	342	771	1,113
Dance	11,356	2,280	13,636	10,803	1,992	12,795	9,630	2,071	11,701	10,260	2,848	13,108	8,286	2,284	10,570
Drama/Theater	19,913	15,266	35,179	20,491	15,555	36,046	17,745	12,734	30,479	18,048	12,795	30,843	19,476	14,630	34,106
Engineering and Architecture	4,213	10,165	14,378	3,744	9,068	12,812	2,781	6,658	9,439	2,573	6,260	8,833	1,311	3,878	5,189
English Language Arts	27,235	26,494	53,729	28,896	28,813	57,709	25,798	25,909	51,707	27,092	26,591	53,683	27,448	26,854	54,302
Fashion and Interior Design	1,493	308	1,801	2,344	460	2,804	764	175	939	1,008	266	1,274	866	152	1,018
Information and Communications Technology	1,443	2,017	3,460	1,533	2,058	3,591	479	868	1,347	560	825	1,385	319	568	887
Manufacturing and Product Development	1,178	1,720	2,898	743	1,267	2,010	528	1,146	1,674	563	1,276	1,839	518	1,126	1,644
Music	63,094	58,012	121,106	63,484	58,263	121,747	60,422	57,667	118,089	67,026	63,768	130,794	60,540	60,671	121,211
Creative Course Totals:	227,135	220,871	448,006	229,144	223,234	452,378	210,623	207,481	418,104	217,218	212,843	430,061	210,725	208,395	419,120
All Courses Totals:	2,833,806	2,984,925	5,818,731	2,842,651	2,975,024	5,817,675	2,251,156	2,367,010	4,618,166	2,886,439	3,013,782	5,900,221	2,811,087	2,934,769	5,745,856

Source: California Department of Education, DataQuest

EXHIBIT 10-2: LOS ANGELES COUNTY K-12 CREATIVE COURSES MEETING UC/CSU REQUIREMENTS

COURSE SUBJECT AREA	ACADEMIC YEAR									
	2014-2015		2013-2014		2012-2013		2011-2012		2010-2011	
	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements
Agriculture and Natural Resources	85	6	116	0	---	---	---	---	---	---
Art	7,577	5,105	7,375	5,079	6,210	3,856	6,503	3,629	6,339	3,772
Arts, Media, and Entertainment	1,706	888	1,642	719	1,391	638	1,350	504	792	404
Building Trades and Construction	227	0	238	0	217	5	183	11	175	2
Computer Education	31	0	36	0	35	2	45	2	53	4
Dance	512	244	496	219	397	154	438	161	345	157
Drama/Theater	1,589	1,007	1,514	908	1,104	631	1,134	645	1,172	720
Engineering and Architecture	552	314	485	247	346	133	335	114	208	65
English Language Arts	3,214	2,314	3,207	2,186	2,417	1,621	2,190	1,369	2,149	1,485
Fashion and Interior Design	109	5	178	4	44	5	64	6	53	4
Information and Communications Technology	159	14	176	25	46	4	55	1	29	6
Manufacturing and Product Development	129	15	100	5	61	25	69	35	61	40
Music	4,027	1,697	3,963	1,659	3,592	1,528	3,980	1,492	3,550	1,447
Creative Course Totals:	19,917	11,609	19,526	11,051	15,860	8,602	16,346	7,969	14,926	8,106
All Courses Totals:	273,583	101,200	268,462	99,213	190,385	88,238	249,599	78,969	230,819	71,124

Source: California Department of Education, DataQuest

EXHIBIT 10-3: ORANGE COUNTY K-12 CREATIVE COURSE ENROLLMENT BY SEX

	ACADEMIC YEAR														
	2014-2015			2013-2014			2012-2013			2011-20112			2010-2011		
COURSE SUBJECT AREA	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total
Agriculture and Natural Resources	397	128	525	340	83	423	---	---	---	---	---	---	---	---	---
Art	20,649	20,543	41,192	18,131	18,318	36,449	21,696	22,289	43,985	20,678	20,981	41,659	22,817	23,474	46,291
Arts, Media, and Entertainment	11,233	13,045	24,278	10,338	11,975	22,313	8,421	10,674	19,095	8,318	9,601	17,919	6,357	7,261	13,618
Building Trades and Construction	210	745	955	220	684	904	157	662	819	163	917	1,080	101	651	752
Computer Education	107	233	340	117	168	285	55	147	202	74	231	305	5,916	7,415	13,331
Dance	3,961	394	4,355	4,552	421	4,973	5,072	439	5,511	5,812	612	6,424	5,205	363	5,568
Drama/Theater	5,273	3,791	9,064	5,611	4,181	9,792	5,706	3,829	9,535	6,089	4,229	10,318	6,307	4,763	11,070
Engineering and Architecture	413	2,096	2,509	334	1,511	1,845	335	1,528	1,863	252	1,305	1,557	121	594	715
English Language Arts	3,115	2,104	5,219	3,082	2,160	5,242	3,106	1,979	5,085	8,711	7,955	16,666	8,919	7,930	16,849
Fashion and Interior Design	579	141	720	625	140	765	460	93	553	487	85	572	390	84	474
Information and Communications Technology	247	520	767	50	126	176	144	262	406	94	193	287	101	160	261
Manufacturing and Product Development	235	670	905	185	431	616	62	184	246	92	164	256	92	138	230
Music	25,058	22,116	47,174	24,588	21,955	46,543	23,597	21,602	45,199	28,016	26,158	54,174	23,403	22,811	46,214
Creative Course Totals:	**71,477**	**66,526**	**138,003**	**68,173**	**62,153**	**130,326**	**68,811**	**63,688**	**132,499**	**78,786**	**72,431**	**151,217**	**79,729**	**75,644**	**155,373**
All Courses Totals:	**886,704**	**922,244**	**1,808,948**	**878,186**	**910,371**	**1,788,557**	**726,948**	**758,828**	**1,485,776**	**905,009**	**942,460**	**1,847,469**	**902,280**	**940,338**	**1,842,618**

Source: California Department of Education, DataQuest

EXHIBIT 10-4: ORANGE K–12 CREATIVE COURSES MEETING UC/CSU REQUIREMENTS

	ACADEMIC YEAR									
	2014–2015		2013–2014		2012–2013		2011–2012		2010–2011	
COURSE SUBJECT AREA	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements	#Classes	Classes Meeting UC/CSU Requirements
Agriculture and Natural Resources	26	6	27	5	---	---	---	---	---	---
Art	1,571	1,064	1,625	1,114	1,508	1,039	1,552	1,017	1,464	1,022
Arts, Media, and Entertainment	941	640	914	629	666	437	686	399	471	288
Building Trades and Construction	44	0	38	0	34	0	37	0	29	0
Computer Education	11	3	11	2	7	0	12	0	308	17
Dance	151	97	175	103	174	109	192	126	179	122
Drama/Theater	354	185	381	191	328	169	335	173	366	188
Engineering and Architecture	125	39	91	28	77	22	61	19	31	5
English Language Arts	213	122	213	100	191	100	592	125	584	102
Fashion and Interior Design	46	4	42	6	22	2	24	2	17	0
Information and Communications Technology	23	0	5	0	13	0	9	0	8	0
Manufacturing and Product Development	39	2	27	2	12	1	11	0	8	5
Music	1,626	593	1,578	595	1,238	548	1,603	639	1,242	553
Creative Course Totals:	**5,170**	**2,755**	**5,127**	**2,775**	**4,270**	**2,427**	**5,114**	**2,500**	**4,707**	**2,302**
All Courses Totals:	**66,350**	**24,645**	**64,666**	**23,998**	**48,225**	**23,079**	**62,970**	**22,350**	**61,199**	**22,282**

Source: California Department of Education, DataQuest

POSTSECONDARY ARTS EDUCATION

Southern California is enjoys an abundance of high caliber postsecondary educational institutions offering a rich selection of arts programs. The number of persons employed in postsecondary arts education is difficult to determine. Individuals who work at fine and performing arts schools are reported in the QCEW employment data (NAICS 61151) but arts educators at colleges and universities, and technical schools that offer arts-related degree programs are not otherwise separated in the industry employment data. However, the occupational data lists postsecondary teachers by discipline and they have been included in appendix Exhibit A-7.

Below is a list of universities, colleges, and trade and technical schools in Los Angeles and Orange counties offering degree programs in the creative industries.

EXHIBIT 10-1: POSTSECONDARY INSTITUTIONS OFFERING ARTS DEGREE PROGRAMS IN THE LOS ANGELES REGION

INDEPENDENT VISUAL AND PERFORMING ARTS SCHOOLS		
Art Center College of Design	Columbia College, Hollywood	New York Film Academy, Los Angeles
California Institute of the Arts	L.A. Film School	Otis College of Art and Design
The Colburn School	Laguna College of Art and Design	
COLLEGES AND UNIVERSITIES		
American Film Institute	Chapman University	Pomona College
Azusa Pacific University	Claremont Graduate University	Scripps College
Biola University	Claremont McKenna College	University of California, Irvine
California Polytechnic University, Pomona	Concordia University, Irvine	University of California, Los Angeles
CSU, Dominguez Hills	Loyola Marymount University	University of LaVerne
CSU, Fullerton	Occidental College	University of Southern California
CSU, Long Beach	Mount St. Mary's College	Vanguard University of Southern California
CSU, Los Angeles	Pepperdine University	Wittier College
CSU, Northridge	Pitzer College	Woodbury University
COMMUNITY COLLEGES		
Cerritos College	Glendale Community College	Los Angeles Valley College
Citrus College	Golden West College	Moorpark College
Coastline Community College	Irvine Valley College	Orange Coast College
College of the Canyons	Los Angeles City College	Pasadena City College
Cypress College	Los Angeles Harbor College	Rio Hondo College
East Los Angeles College	Los Angeles Mission College	Saddleback College
El Camino college	Los Angeles Pierce College	Santa Monica College
Fashion Institute of Design and Merchandising (LA) (OC)	Los Angeles Southwest College	Santiago Canyon College
Fullerton College	Los Angeles Trade and Technical College	West Los Angeles College

Source: Compiled by the LAEDC

11 STATISTICAL APPENDIX

NOTES ON METHODOLOGY AND DATA

In 2007, Otis College of Art and Design commissioned the LAEDC to undertake the first comprehensive analysis of the creative economy in the Los Angeles region and evaluate its contribution to the overall regional economy. The *Otis Report on the Creative Economy* of the Los Angeles Region has been produced every year since then.

In 2013, the research methodology utilized in this report changed in three ways. The first two changes involved revisions in the definition of the creative economy. First, additional subsectors within the creative industries were added to the existing creative industries. Second, a new sector was added: publishing and printing. Both of these changes better align the creative industry definitions used in this research with the definitions that are increasingly being adopted elsewhere in the literature. The creative sectors or industries in this report encompass the following:

- Architecture and interior design
- Art galleries
- Arts education
- Communication arts
- Digital media
- Entertainment
- Fashion
- Furniture and decorative arts
- Industrial design services
- Publishing and printing
- Toys
- Visual and performing arts

The third change relates to data used in the contribution analysis portion of this study. In a departure from previous years, beginning in 2013, the IMPLAN model was utilized to assess the economic contribution of the creative industries to the overall economy. In conceptual terms, economic contribution analysis evaluates the ripple effect of a specific economic activity throughout the rest of the economy. Contribution analysis captures the direct impact as well as the indirect and induced impacts of that activity on employment, output, and taxes.

Additionally, the contribution analysis began using employment and payroll data from the Quarterly Census of Employment and Wages (QCEW), rather than the estimated sales, shipments, and revenues that were based on data from the Economic Census.

The data collected for this report includes employment, establishments, payroll, and other measures of creative activity in the Los Angeles region. These data come from the following sources:

- U.S. Bureau of the Census
- U.S. Bureau of Labor Statistics (BLS)
- U.S. Bureau of Economic Analysis (BEA)
- California Employment Development Department (EDD)
- California Department of Education
- Internal Revenue Service (IRS)

Much of the industry-level information in this report comes directly from the Bureau of Labor Statistics' QCEW Series. These data are based on unemployment tax payments that all firms with employees are required to make into the state unemployment insurance fund. Because the coverage is so comprehensive, this is the best available source for employment and wage information.

Because the definitions used in this study were expanded and because the methodology for calculating the economic contribution has been altered from previous years, the figures contained in this report and those after 2013 are not directly comparable to the studies conducted by Otis and the LAEDC in the years prior to these changes.

EXHIBIT A-1: ECONOMIC CONTRIBUTION OF LOS ANGELES COUNTY'S CREATIVE INDUSTRIES, 2015								
					TOTAL CONTRIBUTION (DIRECT, INDIRECT, INDUCED)			
INDUSTRY	Establishments	Jobs	Payroll ($ millions)	Self-Employed	Output ($ millions)	Total Jobs	Labor Income ($ millions)	Taxes ($ millions)
Architecture and Interior Design	1,858	12,100	999.4	5,104	3,619.3	22,000	1,535.1	130.7
Art Galleries	233	800	60.4	695	87.7	1,200	77.2	10.4
Communication Arts	2,271	20,900	2,056.9	28,246	6,956.9	36,700	2,885.6	265.9
Digital Media	258	7,200	1,796.8	---	5,185.1	17,800	2,360.9	210.5
Entertainment	6,823	141,400	15,704.4	20,867	89,992.2	248,100	21,720.1	3,064.9
Fashion	6,678	87,600	3,800.2	6,783	26,762.5	138,600	6,781.2	1,882.2
Furniture and Decorative Arts	1,603	29,600	1,375.8	1,634	9,297.3	45,900	2,319.5	534.3
Industrial Design Services	111	400	23.8	---	71.1	600	33.0	3.4
Publishing and Printing	2,055	33,800	2,594.3	4,298	16,401.7	76,000	4,964.8	529.1
Toys	235	4,700	448.7	393	2,137.4	9,100	701.2	189.3
Visual and Performing Arts Providers	9,706	32,200	6,054.2	81,437	9,924.6	65,300	7,800.3	604.7
Fine and Performing Arts Schools	466	3,900	117.8	---	274.2	4,600	159.6	12.8
TOTALS:	32,297	374,500	35,033.8	149,457	170,710.0	665,800	51,338.6	7,438.2

(Totals may not add up due to rounding)
Source: Bureau of Labor Statistics, U.S. Census Bureau, estimates by IAE

EXHIBIT A-2: ECONOMIC CONTRIBUTION OF ORANGE COUNTY'S CREATIVE INDUSTRIES, 2015

					TOTAL CONTRIBUTION (DIRECT, INDIRECT, INDUCED)			
INDUSTRY	Establishments	Jobs	Payroll ($ millions)	Self-Employed	Output ($ millions)	Total Jobs	Labor Income ($ millions)	Taxes ($ millions)
Architecture and Interior Design	784	6,300	503.2	1,672	1,781.6	11,300	790.8	64.7
Art Galleries	48	200	7.3	206	15.7	200	9.8	1.8
Communication Arts	654	4,200	315.3	9,034	1,197.3	6,900	468.8	43.3
Digital Media	148	6,000	833.5	---	2,935.7	9,000	263.9	56.4
Entertainment	241	1,900	141.2	1,516	1,407.6	3,700	256.0	30.4
Fashion	694	10,600	574.1	1,415	3,801.4	17,500	1,009.2	259.6
Furniture and Decorative Arts	487	8,200	420.1	504	2,809.6	13,500	977.3	141.0
Industrial Design Services	51	500	49.3	---	98.3	800	65.6	5.7
Publishing and Printing	767	12,700	767.6	1,424	4,819.9	24,100	1,456.6	147.5
Toys	48	500	36.0	115	204.6	900	61.6	19.7
Visual and Performing Arts Providers	349	2,600	105.0	9,647	458.3	3,700	167.6	18.0
Fine and Performing Arts Schools	151	1,200	26.4	---	83.5	1,400	37.9	3.1
TOTALS:	**4,422**	**54,900**	**3,779.0**	**25,533**	**19,613.6**	**93,100**	**5,565.0**	**791.2**

(Totals may not add up due to rounding)
Source: Bureau of Labor Statistics, U.S. Census Bureau, estimates by IAE

EXHIBIT A-3: LOS ANGELES COUNTY CREATIVE INDUSTRIES EMPLOYMENT	NAICS	AVG. NUMBER OF JOBS		2010–2015 CHANGE	
	Code	2010	2015	Number	Percent
Architecture and Interior Design:		**10,000**	**12,100**	**2,100**	**21.1%**
Architectural Services	54131	6,300	7,700	1,400	21.7%
Landscape Design	54132	800	1,100	300	24.8%
Drafting Services	54134	300	200	-100	-11.8%
Interior Design	54141	1,500	2,100	600	46.2%
Ornamental and Architectural Metal Work Mfg.	332323	1,100	1,000	-100	-9.1%
Art Galleries:	**45392**	**700**	**800**	**100**	**16.6%**
Communication Arts:		**17,500**	**20,900**	**3,400**	**19.7%**
Graphic Design	54143	4,100	4,600	500	13.7%
Advertising Agencies	54181	11,300	14,200	2,900	25.6%
Photography Studios, Portrait	541921	1,600	1,500	-100	-8.4%
Commercial Photography	541922	500	600	100	27.5%
Digital Media:		**5,300**	**7,200**	**1,900**	**36.9%**
Software Publishers	5112	5,300	7,200	1,900	36.9%
Entertainment:		**131,600**	**141,400**	**9,900**	**7.5%**
Motion Picture/Video Production	51211	100,900	110,600	9,700	9.7%
Motion Picture Distribution	51212	2,200	2,200	0	-0.4%
Post Production Services	51219	8,900	7,300	-1,600	-18.5%
Sound Recording	5122	3,000	2,700	-300	-11.5%
Radio Stations	515112	2,000	1,900	-100	-7.0%
Television Broadcasting	515120	10,200	12,700	2,500	24.4%
Cable Broadcasting	5152	4,300	4,000	-300	-6.9%
Fashion:		**86,900**	**87,600**	**700**	**0.6%**
Textile Mills Manufacturing	313	7,200	6,200	-1,000	-14.3%
Apparel Manufacturing	315	47,700	41,200	-6,500	-13.6%
Apparel Wholesaling	4243	20,500	26,500	6,000	29.1%
Footwear Manufacturing	3162	500	300	-200	-42.9%
Footwear Wholesaling	42434	2,600	3,200	600	21.5%
Women's Handbag Manufacturing	316992	20	90	70	473.3%
Cosmetics Manufacturing	32562	4,200	4,800	600	13.6%
Jewelry Manufacturing	33991	1,500	1,900	400	25.0%
Jewelry Wholesaling	42394	3,900	4,800	900	24.0%
Other Specialized Design Services	54149	1,400	1,800	400	24.4%
Furniture and Decorative Arts:		**27,100**	**29,600**	**2,500**	**8.8%**
Textile Product Mills	314	4,100	4,200	100	2.9%
Furniture Manufacturing	337	12,800	14,500	1,700	12.6%
Furniture Wholesaling	4232	7,200	8,100	900	12.3%
Electric Lighting Fixtures	33512	2,300	2,400	100	3.0%

EXHIBIT A-3: LOS ANGELES COUNTY CREATIVE INDUSTRIES EMPLOYMENT, CONTINUED					
	NAICS	AVG. NUMBER OF JOBS		2010–2015 CHANGE	
	Code	2010	2015	Number	Percent
Other China, Fine Earthenware and Pottery Mfg.	327112	300	0	-300	---
Pressed and Blown Glass and Glassware Mfg.	327212	100	100	0	89%
Other Misc. Nonmetallic Mineral Product Mfg.	327999	300	300	0	-7.5%
Industrial Design Services:	**54142**	**700**	**400**	**-300**	**-39.2%**
Publishing and Printing:		**33,500**	**33,800**	**300**	**1.2%**
Printing and Related Support Activities	3231	16,500	14,300	-2,200	-13.4%
Book, Periodical, Newspaper Wholesalers	424920	900	600	-300	-30.4%
Newspaper Publishers	511110	3,300	3,400	100	4.9%
Periodical Publishers	511120	4,600	3,500	-1,100	-23.1%
Book Publishers	511130	600	600	0	-3.8%
Greeting Card Publishers	511191	20	10	-10	-30.0%
All Other Publishers	511199	300	700	400	162.7%
Libraries and Archives	519120	800	1,200	400	36.8%
Internet Publishing and Broadcasting	519130	6,500	9,500	3,000	47.1%
Toys:		**4,500**	**4,700**	**200**	**4.6%**
Toy Manufacturing	33993	1,400	1,600	200	9.8%
Toy Wholesaling	42392	3,100	3,100	0	2.2%
Visual and Performing Arts Providers:		**24,800**	**32,200**	**7,400**	**29.7%**
Theater Companies	71111	2,000	2,200	200	12.9%
Dance Companies	71112	80	100	20	71.4%
Musical Groups	71113	2,700	3,200	500	18.5%
Other Performing Arts Companies.	71119	100	40	-60	-60.0%
Agents and Managers of Artists, etc.	71141	6,500	8,700	2,200	33.8%
Independent Artists, Writers, etc.	71151	9,500	13,100	3,600	38.2%
Museums	71211	3,600	4,400	800	22.2%
Musical Instrument Manufacturing	339992	300	500	200	66.7%
Fine and Performing Arts Schools		**3,300**	**3,900**	**600**	**18.2%**
Fine and Performing Arts Schools	61161	3,300	3,900	600	18.2%
TOTAL		**345,900**	**374,500**	**28,700**	**8.3%**

Totals and percentages may not add up due to rounding)
Source: Bureau of Labor Statistics, QCEW Series; Estimates by IAE

EXHIBIT A-4: LOS ANGELES COUNTY CREATIVE INDUSTRIES EMPLOYMENT YEAR-TO-YEAR COMPARISONS, 2010–2015

CREATIVE INDUSTRY	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015
Architecture and Interior Design	10,000	9,900	10,100	10,200	11,200	12,100	-11.6%	-1.0%	2.0%	1.0%	9.8%	8.0%
Art Galleries	700	700	800	800	800	800	-17.9%	0.0%	14.3%	0.0%	0.0%	0.0%
Communication Arts	17,500	18,600	19,700	19,900	19,800	20,900	-5.0%	6.3%	5.9%	1.0%	-0.5%	5.6%
Digital Media	5,300	5,100	5,500	5,800	6,100	7,200	-8.7%	-3.8%	7.8%	5.5%	5.2%	18.0%
Entertainment	131,600	132,800	132,900	132,800	135,800	141,400	1.6%	0.9%	0.1%	-0.1%	2.3%	4.1%
Fashion	86,900	85,500	86,800	89,900	89,100	87,600	0.1%	-1.6%	1.5%	3.6%	-0.9%	-1.7%
Furniture and Decorative Arts	27,100	27,000	27,300	28,700	29,000	29,600	-6.5%	-0.4%	1.1%	5.1%	1.0%	2.1%
Industrial Design Services	700	800	400	400	400	400	10.9%	14.3%	-50.0%	0.0%	0.0%	0.0%
Publishing and Printing	33,500	32,200	32,400	32,300	32,800	33,800	-9.6%	-3.9%	0.6%	-0.3%	1.5%	3.0%
Toys	4,500	4,400	4,500	4,800	4,700	4,700	-4.8%	-2.2%	2.3%	6.7%	-2.1%	0.0%
Visual and Performing Arts Providers	24,800	26,300	27,900	28,500	31,900	32,200	-1.5%	6.0%	6.1%	2.2%	11.9%	0.9%
Fine and Performing Arts Schools	3,300	3,500	3,500	3,700	3,900	3,900	5.6%	6.1%	0.0%	5.7%	5.4%	0.0%
TOTAL	**345,900**	**346,800**	**351,800**	**357,800**	**365,500**	**374,500**	**-1.9%**	**0.3%**	**1.4%**	**1.7%**	**2.2%**	**2.5%**

(Totals and percentages may not add up due to rounding)
Source: Bureau of Labor Statistics, QCEW

EXHIBIT A-5: ORANGE COUNTY CREATIVE INDUSTRY EMPLOYMENT

	NAICS	AVG. NUMBER OF JOBS		2010–2015 CHANGE	
	Code	2010	2015	Number	Percent
Architecture and Interior Design:		**4,700**	**6,300**	**1,600**	**34.5%**
Architectural Services	54131	2,700	3,500	800	29.5%
Landscape Design	54132	900	900	0	4.5%
Drafting Services	54134	80	90	10	3.7%
Interior Design	54141	700	1,100	400	55.1%
Ornamental and Architectural Metal Work Mfg.	332323	300	700	400	115.7%
Art Galleries:	**45392**	**100**	**200**	**100**	**27.2%**
Communication Arts:		**3,800**	**4,200**	**400**	**10.0%**
Graphic Design	54143	1,000	900	-100	-13.9%
Advertising Agencies	54181	2,200	2,900	700	34.3%
Photography Studios, Portrait	541921	500	300	-200	-38.2%
Commercial Photography	541922	100	100	0	-14.4%
Digital Media:		**4,500**	**6,000**	**1,500**	**34.7%**
Software Publishers	5112	4,500	6,000	1,500	34.7%
Entertainment:		**2,600**	**1,900**	**-700**	**-24.2%**
Motion Picture/Video Production	51211	600	600	0	11.1%
Motion Picture Distribution	51212	10	40	30	700.0%
Post Production Services	51219	60	60	0	-0%
Sound Recording	5122	100	60	-40	-31.5%
Radio Stations	515112	500	100	-400	-79.1%
Television Broadcasting	515120	200	300	100	87.5%
Cable Broadcasting	5152	1,100	700	-400	-38.9%
Fashion:		**10,600**	**10,600**	**0**	**-0.1%**
Textile Mills Manufacturing	313	700	700	0	-4.1%
Apparel Manufacturing	315	5,900	4,700	-1,200	-20.2%
Apparel Wholesaling	4243	3,100	3,900	800	26.0%
Footwear Manufacturing	3162	50	100	50	152.2%
Footwear Wholesaling	42434	700	900	200	32.3%
Women's Handbag Manufacturing	316992	40	10	-30	-84.6%
Cosmetics Manufacturing	32562	200	500	300	129.2%
Jewelry Manufacturing	33991	100	80	-20	-31.8%
Jewelry Wholesaling	42394	200	500	300	105.2%
Other Specialized Design Services	54149	300	100	-200	-49.7%

EXHIBIT A-5: ORANGE COUNTY CREATIVE INDUSTRY EMPLOYMENT, CONTINUED

	NAICS	AVG. NUMBER OF JOBS		2010–2015 CHANGE	
	Code	2010	2015	Number	Percent
Furniture and Decorative Arts:		**8,100**	**8,200**	**100**	**1.0%**
Textile Product Mills	314	1,600	1,400	-200	-11.0%
Furniture Manufacturing	337	3,700	4,000	300	8.2%
Furniture Wholesaling	4232	1,500	1,600	100	6.8%
Electric Lighting Fixtures	33512	900	1,100	200	14.3%
China Plumbing Fixtures, China, Earthenware Mfg.	327111	0	0	0	---
Other China, Fine Earthenware and Pottery Mfg.	327112	40	0	-40	---
Pressed & Blown Glass and Glassware Mfg.	327212	30	20	-10	-39.4%
Other Misc. Nonmetallic Mineral Product Mfg.	327999	300	70	-230	-75.7%
Industrial Design Services:	**54142**	**400**	**500**	**100**	**40.6%**
Publishing and Printing:		**13,300**	**12,700**	**-600**	**-5.5%**
Printing and Related Support Activities	3231	8,200	7,800	-400	-5.6%
Book, Periodical, Newspaper Wholesalers	424920	100	200	100	11.6%
Newspaper Publishers	511110	1,400	1,200	-200	-13.2%
Periodical Publishers	511120	1,400	900	-500	-38.9%
Book Publishers	511130	400	400	0	3.6%
Greeting Card Publishers	511191	0	0	0	---
All Other Publishers	511199	40	30	-10	-36.4%
Libraries and Archives	519120	20	100	80	521.7%
Internet Publishing and Broadcasting	519130	1,700	2,100	400	20.6%
Toys:		**500**	**500**	**0**	**-6.6%**
Toy Manufacturing	33993	100	100	0	54.9%
Toy Wholesaling	42392	400	400	0	-18.0%
Visual and Performing Arts Providers:		**2,300**	**2,600**	**300**	**8.9%**
Theater Companies	71111	700	800	100	14.8%
Dance Companies	71112	60	90	30	63.2%
Musical Groups	71113	300	200	-100	-16.8%
Other Performing Arts Companies.	71119	10	10	0	55.6%
Agents and Managers of Artists, etc.	71141	60	200	140	172.9%
Independent Artists, Writers, etc.	71151	700	600	-100	-23.2%
Museums	71211	400	500	100	38.2%
Musical Instrument Manufacturing	339992	100	200	100	20.3%
Fine and Performing Arts Schools		**900**	**1,200**	**300**	**38.3%**
Fine and Performing Arts Schools	61161	900	1,200	300	38.3%
TOTAL		**51,900**	**54,900**	**3,000**	**5.7%**

(Totals and percentages may not add up due to rounding)
Source: Bureau of Labor Statistics, QCEW Series; Estimates by IAE

EXHIBIT A-6: ORANGE COUNTY CREATIVE INDUSTRIES EMPLOYMENT YEAR-TO-YEAR COMPARISONS, 2010–2015

CREATIVE INDUSTRY	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015
Architecture and Interior Design	4,700	5,100	5,400	5,300	6,000	6,300	-6.4%	8.5%	5.9%	-1.9%	13.2%	5.0%
Art Galleries	100	100	100	200	200	200	-63.4%	0.0%	0.0%	100.0%	0.0%	0.0%
Communication Arts	3,800	3,700	4,100	4,100	4,300	4,200	-3.0%	-2.6%	10.8%	0.0%	4.9%	-2.3%
Digital Media	4,500	4,900	5,100	5,200	5,200	6,000	4.0%	8.9%	4.1%	2.0%	0.0%	15.4%
Entertainment	2,600	2,300	2,600	2,700	2,100	1,900	4.0%	-11.5%	13.0%	3.8%	-22.2%	-11.4%
Fashion	10,600	10,200	10,700	11,000	11,200	10,600	-0.8%	-3.8%	4.9%	2.8%	1.8%	-5.4%
Furniture and Decorative Arts	8,100	7,900	7,700	7,800	8,200	8,200	-10.1%	-2.5%	-2.5%	1.3%	5.1%	0.0%
Industrial Design Services	400	300	300	400	500	500	-5.2%	-25.0%	0.0%	33.3%	25.0%	0.0%
Publishing and Printing	13,300	12,800	12,900	13,200	12,700	12,700	-7.9%	-3.8%	0.8%	2.3%	-3.8%	0.0%
Toys	500	500	500	500	500	500	-6.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Visual and Performing Arts Providers	2,300	2,500	2,600	2,500	2,700	2,600	-4.0%	8.7%	4.0%	-3.8%	8.0%	-3.7%
Fine and Performing Arts Schools	900	900	900	1,000	1,000	1,200	2.6%	0.0%	0.0%	11.1%	0.0%	20.0%
TOTAL	51,900	51,200	52,900	53,900	54,600	54,900	-4.8%	-1.2%	3.3%	1.9%	1.3%	0.5%

(Totals and percentages may not add up due to rounding)
Source: Bureau of Labor Statistics, QCEW

EXHIBIT A-7: LOS ANGELES COUNTY EMPLOYMENT BY CREATIVE OCCUPATION, 2015

OCCUPATIONAL TITLE	SOC Code	2015 Employment	Projected Openings Over 5 Years	Location Quotient	Education Needed for Entry Level	Work Experience Needed for Entry Level	On-the-Job Training to Attain Competency	2015 Annual Median Wage ($)
Management Occupations								
Advertising and Promotions Managers	11-2011	1,480	355	1.69	3	< 5 years	None	105,440
Marketing Managers	11-2021	6,300	1,435	1.10	3	→ 5 years	None	139,080
Public Relations and Fundraising Managers	11-2031	1,710	365	0.95	3	→ 5 years	None	111,130
Business and Financial Operations Occupations								
Agents and Business Managers of Artists, Performers, and Athletes	13-1011	4,380	1,230	11.13	3	< 5 years	None	75,750
Computer and Mathematical Occupations								
Software Developers, Applications	15-1132	15,220	2,590	0.68	3	None	None	109,540
Software Developers, System Software	15-1133	10,790	2,085	0.93	3	None	None	116,900
Architecture and Engineering Occupations								
Architects, Except Landscape and Naval	17-1011	3,860	445	1.38	**	**	**	87,800
Landscape Architects	17-1012	340	60	0.58	3	None	I/R	83,600
Architectural and Civil Drafters	17-3011	3,500	180	1.24	4	None	None	57,540
Education, Training, and Library Occupations								
Architecture Teachers, Postsecondary	25-1031	220	25	1.01	**	**	**	76,480
Anthropology and Archeology Teachers, Postsecondary	25-1061	130	15	0.71	1	None	None	107,560
Area, Ethnic, and Cultural Studies Teachers, Postsecondary	25-1062	250	45	0.92	1	None	None	86,200
Library Science Teachers, Postsecondary	25-1082	50	5	0.36	**	**	**	100,320
Art, Drama, and Music Teachers, Postsecondary	25-1121	4,660	595	1.59	2	None	None	80,010
Communications Teachers, Postsecondary	25-1122	1,180	110	1.37	1	None	None	82,990
English Language and Literature Teachers, Postsecondary	25-1123	2,420	190	1.07	1	None	None	79,020
Foreign Language and Literature Teachers, Postsecondary	25-1124	1,370	200	1.52	1	None	None	74,580
History Teachers, Postsecondary	25-1125	430	55	0.61	1	None	None	89,760
Archivists	25-4011	320	100	1.97	2	None	None	41,870
Curators	25-4012	350	75	0.98	2	None	None	67,450
Museum Technicians and Conservators	25-4013	640	115	2.00	3	None	None	49,540
Librarians	25-4021	2,680	430	0.68	2	None	None	74,140
Library Technicians	25-4031	1,830	635	0.65	5	None	None	41,160
Audio-Visual and Multimedia Collections Specialists	25-9011	390	10	1.29	5	< 5 years	None	42,160

EXHIBIT A-7: LOS ANGELES COUNTY EMPLOYMENT BY CREATIVE OCCUPATION, 2015, CONTINUED

OCCUPATIONAL TITLE	SOC Code	2015 Employment	Projected Openings Over 5 Years	Location Quotient	Education Needed for Entry Level	Work Experience Needed for Entry Level	On-the-Job Training to Attain Competency	2015 Annual Median Wage ($)
Art, Design, Entertainment, Sports, and Media Occupations								
Art Directors	27-1011	3,280	905	3.17	3	> 5 years	None	114,190
Craft Artists	27-1012	575	95	**	7	None	LT OJT	64,920
Fine Artists, Including Painters, Sculptors, and Illustrators	27-1013	1,390	665	3.81	7	None	LT OJT	61,610
Multimedia Artists and Animators	27-1014	5,830	2,345	6.47	3	None	MT OJT	83,940
Artists and Related Workers, All Other	27-1019	220	35	0.95	7	None	LT OJT	62,890
Commercial and Industrial Designers	27-1021	1,730	275	1.86	3	None	None	64,100
Fashion Designers	27-1022	4,020	915	7.09	3	None	None	68,540
Floral Designers	27-1023	610	95	0.46	7	None	MT OJT	28,290
Graphic Designers	27-1024	10,010	2,035	1.64	3	None	None	52,140
Interior Designers	27-1025	2,170	475	1.43	3	None	None	59,210
Merchandise Displayers and Window Trimmers	27-1026	1,980	350	0.66	7	None	MT OJT	28,980
Set and Exhibit Designers	27-1027	2,140	265	6.04	3	None	None	49,280
Designers, All Other	27-1029	1,010	215	5.15	3	None	None	67,010
Actors	27-2011	14,560	1,675	9.68				*
Producers and Directors	27-2012	19,560	4,805	6.28	3	< 5 years	None	96,100
Dancers	27-2031	175	240	**	7	None	LT OJT	*
Choreographers	27-2032	200	105	1.34	7	> 5 years	LT OJT	41,130
Music Directors and Composers	27-2041	700	110	1.09	3	< 5 years	None	51,110
Musicians and Singers	27-2042	2,810	1,150	2.55	7	None	LT OJT	*
Radio and Television Announcers	27-3011	1,210	160	1.34	3	None	None	43,740
Public Address System and Other Announcers	27-3012	350	130	1.48	7	None	ST OJT	26,240
Broadcast News Analysts	27-3021	330	65	2.34	3	None	None	62,690
Reporters and Correspondents	27-3022	1,600	335	1.31	3	None	None	38,740
Public Relations Specialists	27-3031	7,130	860	1.09	3	None	None	60,760
Editors	27-3041	4,060	670	1.41	3	< 5 years	None	64,240
Technical Writers	27-3042	1,550	330	1.05	3	< 5 years	ST OJT	75,470
Writers and Authors	27-3043	4,890	1,735	3.79	3	None	MT OJT	*
Media and Communication Workers, All Other	27-3099	7,260	1,300	10.97	7	None	ST OJT	45,600
Audio and Video Equipment Technicians	27-4011	7,670	800	4.13	5	None	ST OJT	51,050
Broadcast Technicians	27-4012	2,150	290	2.56	4	None	ST OJT	56,750
Sound Engineering Technicians	27-4014	3,100	315	7.53	5	None	ST OJT	62,590
Photographers	27-4021	2,620	305	1.76	7	None	LT OJT	56,340
Camera Operators, Television, Video, and Motion Picture	27-4031	4,360	265	7.31	3	None	None	60,020
Film and Video Editors	27-4032	10,000	565	12.15	3	None	None	94,130
Media and Communication Equipment Workers, All Other	27-4099	5,880	460	11.19	7	None	ST OJT	74,480

EXHIBIT A-7: LOS ANGELES COUNTY EMPLOYMENT BY CREATIVE OCCUPATION, 2015, CONTINUED								
OCCUPATIONAL TITLE	SOC Code	2015 Employment	Projected Openings Over 5 Years	Location Quotient	Education Needed for Entry Level	Work Experience Needed for Entry Level	On-the-Job Training to Attain Competency	2015 Annual Median Wage ($)
Personal Care and Service Occupations								
Motion Picture Projectionists	39-3021	160	50	0.98	8	None	ST OJT	24,030
Costume Attendants	39-3092	1,020	255	5.61	7	None	ST OJT	44,220
Makeup Artists, Theatrical and Performance	39-5091	1,100	85	12.05	5	None	None	80,140
Sales and Related Occupations								
Advertising Sales Agents	41-3011	8,040	980	1.80	7	None	MT OJT	63,400
Office and Administrative Support Occupations								36,030
Library Assistants, Clerical	43-4121	2,910	790	0.98	7	None	ST OJT	27,270
Desktop Publishers	43-9031	560	30	1.41	4	None	ST OJT	44,640
Installation, Maintenance, and Repair Occupations								
Electronic Home Entertainment Equipment Installers and Repairers	49-2097	590	140	0.73	5	None	None	42,310
Camera and Photographic Equipment Repairers	49-9061	370	45	3.54	**	**	**	38,710
Musical Instrument Repairers and Tuners	49-9063	170	40	0.75	7	None	APP	56,700
Production Occupations								
Sewers, Hand	51-6051	493	35	**	8	None	MT OJT	22,160
Tailors, Dressmakers, and Custom Sewers	51-6052	690	195	1.16	8	None	MT OJT	28,060
Fabric and Apparel Patternmakers	51-6092	1,280	135	8.38	7	None	MT OJT	48,640
Cabinetmakers and Bench Carpenters	51-7011	2,330	75	0.83	7	None	MT OJT	33,760
Jewelers and Precious Stone and Metal Workers	51-9071	1,260	155	1.67	7	None	LT OJT	33,760
Painting, Coating, and Decorating Workers	51-9123	310	50	0.66	8	None	MT OJT	33,590
Photographic Process Workers and Processing Machine Operators	51-9151	640	230	0.90	7	None	ST OJT	29,340
Etchers and Engravers	51-9194	240	35	0.86	7	None	MT OJT	36,270
TOTALS:		**223,800**	**40,015**					

**Indicates data was unavailable

Source: Bureau of Labor Statistics, Occupational Employment Statistics: California EDD; estimates by IAE

ENTRY LEVEL EDUCATION:

1 – Doctoral or Professional Degree
2 – Master's degree
3 – Bachelor's degree
4 – Associate's degree
5 – Postsecondary non-degree award
6 – Some college, no degree
7 – High school diploma or equivalent
8 – Less than high school

WORK EXPERIENCE CODES:

→ 5 years – 5 years' or more experience in a related occupation
< 5 years – Less than 5 years' experience in a related occupation or field is common
None – No work experience is typically required

I/R – Internship/residency
APP – Apprenticeship
LT OJT – Long-term on-the-job training
MT OJT – Moderate-term on-the-job training
ST OJT – Short-term on-the-job training
None – None

EXHIBIT A-8: ORANGE EMPLOYMENT BY CREATIVE OCCUPATION, 2015								
OCCUPATIONAL TITLE	SOC Code	2015 Employment	Projected Openings Over 5 Years	Location Quotient	Education Needed for Entry Level	Work Experience Needed for Entry Level	On-the-Job Training to Attain Competency	2015 Annual Median Wage ($)
Management Occupations								
Advertising and Promotions Managers	11-2011	390	120	1.21	3	< 5 years	None	89,350
Marketing Managers	11-2021	3,630	765	1.70	3	→ 5 years	None	125,280
Public Relations and Fundraising Managers	11-2031	570	90	0.85	3	→ 5 years	None	137,230
Business and Financial Operations Occupations								
Agents and Business Managers of Artists, Performers, and Athletes	13-1011	100	10	0.70	3	< 5 years	None	**
Computer and Mathematical Occupations:								
Software Developers, Applications	15-1132	9,900	1,280	1.20	3	None	None	105,620
Software Developers, System Software	15-1133	7,100	1,100	1.65	3	None	None	114,810
Architecture and Engineering Occupations								
Architects, Except Landscape and Naval	17-1011	1,270	280	1.23	**	**	**	91,850
Landscape Architects	17-1012	1,010	100	4.61	3	None	I/R	67,460
Architectural and Civil Drafters	17-3011	1,990	135	1.89	4	None	None	55,540
Education, Training, and Library Occupations								
Anthropology and Archeology Teachers, Postsecondary	25-1061	40	5	0.66	1	None	None	99,340
Library Science Teachers, Postsecondary	25-1082	50	5	0.86	**	**	**	136,500
Art, Drama, and Music Teachers, Postsecondary	25-1121	1,250	100	1.15	2	None	None	96,810
Communications Teachers, Postsecondary	25-1122	350	45	1.09	1	None	None	111,750
English Language and Literature Teachers, Postsecondary	25-1123	640	100	0.76	1	None	None	129,700
Foreign Language and Literature Teachers, Postsecondary	25-1124	200	35	0.60	1	None	None	132,260
History Teachers, Postsecondary	25-1125	160	25	0.63	1	None	None	129,800
Museum Technicians and Conservators	25-4013	50	5	0.39	3	None	None	38,230
Librarians	25-4021	620	90	0.43	2	None	None	76,840
Library Technicians	25-4031	850	250	0.82	5	None	None	44,950
Audio-Visual and Multimedia Collections Specialists	25-9011	260	5	2.29	3	< 5 years	None	43,980

EXHIBIT A-8: ORANGE EMPLOYMENT BY CREATIVE OCCUPATION, 2015, CONTINUED

OCCUPATIONAL TITLE	SOC Code	2015 Employment	Projected Openings Over 5 Years	Location Quotient	Education Needed for Entry Level	Work Experience Needed for Entry Level	On-the-Job Training to Attain Competency	2015 Annual Median Wage
Arts, Design, Entertainment, Sports, and Media Occupations								
Art Directors	27-1011	560	280	1.46	3	→ 5 years	None	84,940
Craft Artists	27-1012	760	70	**	7	None	LT OJT	32,270
Fine Artists, Including Painters, Sculptors, and Illustrators	27-1013	160	40	1.15	7	None	LT OJT	57,650
Multimedia Artists and Animators	27-1014	700	205	2.11	3	None	MT OJT	66,760
Commercial and Industrial Designers	27-1021	520	105	1.50	3	None	None	65,220
Fashion Designers	27-1022	600	280	2.86	3	None	None	58,840
Floral Designers	27-1023	430	60	0.89	7	None	MT OJT	32,310
Graphic Designers	27-1024	3,300	970	1.46	3	None	None	51,400
Interior Designers	27-1025	1,020	285	1.80	3	None	None	51,630
Merchandise Displayers and Window Trimmers	27-1026	2,190	175	1.97	7	None	MT OJT	24,820
Set and Exhibit Designers	27-1027	180	20	1.35	3	None	None	**
Designers, All Other	27-1029	190	65	2.55	3	None	None	84,830
Actors	27-2011	545	125	**	**	**	**	**
Producers and Directors	27-2012	580	165	0.50	3	< 5 years	None	65,340
Dancers	27-2031	190	20	1.69	7	None	LT OJT	**
Music Directors and Composers	27-2041	280	40	1.18	3	< 5 years	None	56,860
Musicians and Singers	27-2042	800	260	1.94	7	None	LT OJT	**
Radio and Television Announcers	27-3011	250	25	**	3	None	None	33,720
Reporters and Correspondents	27-3022	170	40	0.38	3	None	None	45,930
Public Relations Specialists	27-3031	1,570	235	0.65	3	None	None	70,870
Editors	27-3041	760	170	0.71	3	< 5 years	None	55,280
Technical Writers	27-3042	660	130	1.21	3	< 5 years	ST OJT	83,280
Writers and Authors	27-3043	290	165	0.61	3	None	MT OJT	62,210
Media and Communication Workers, All Other	27-3099	80	100	0.34	7	None	ST OJT	50,710
Audio and Video Equipment Technicians	27-4011	1,020	200	1.48	5	None	ST OJT	46,260
Broadcast Technicians	27-4012	240	230	0.76	4	None	ST OJT	23,240
Sound Engineering Technicians	27-4014	240	35	1.57	5	None	ST OJT	63,100
Photographers	27-4021	720	40	1.30	7	None	LT OJT	**
Film and Video Editors	27-4032	150	35	0.49	3	None	None	29,860
Media and Communication Equipment Workers, All Other	27-4099	80	10	0.42	7	None	ST OJT	60,750

EXHIBIT A-8: ORANGE EMPLOYMENT BY CREATIVE OCCUPATION, 2015, CONTINUED

OCCUPATIONAL TITLE	SOC Code	2015 Employment	Projected Openings Over 5 Years	Location Quotient	Education Needed for Entry Level	Work Experience Needed for Entry Level	On-the-Job Training to Attain Competency	2015 Annual Median Wage
Sales and Related Occupations								
Advertising Sales Agents	41-3011	1,890	495	1.14	7	None	MT OJT	60,270
Office and Administrative Support Occupations								
Library Assistants, Clerical	43-4121	690	190	0.62	7	None	ST OJT	32,080
Desktop Publishers	43-9031	150	10	1.04	4	None	ST OJT	54,520
Installation, Maintenance, and Repair Occupations								
Camera and Photographic Equipment Repairers	49-9061	300	30	**	**	**	**	45,670
Production Occupations								
Sewers, Hand	51-6051	160	5	2.04	8	None	MT OJT	22,630
Tailors, Dressmakers, and Custom Sewers	51-6052	230	140	1.03	8	None	MT OJT	30,420
Fabric and Apparel Patternmakers	51-6092	150	30	2.68	7	None	MT OJT	66,580
Cabinetmakers and Bench Carpenters	51-7011	900	30	0.87	7	None	MT OJT	33,380
Jewelers and Precious Stone and Metal Workers	51-9071	320	5	1.14	7	None	LT OJT	29,700
Painting, Coating, and Decorating Workers	51-9123	130	5	**	8	None	MT OJT	28,530
Photographic Process Workers and Processing Machine Operators	51-9151	330	80	1.26	7	None	ST OJT	33,220
Etchers and Engravers	51-9194	120	40	1.13	7	None	MT OJT	**
TOTALS:		55,000	10,185					

**Indicates data was unavailable

Source: Bureau of Labor Statistics, Occupational Employment Statistics: California EDD; estimates by IAE

ENTRY LEVEL EDUCATION:

1 – Doctoral or Professional Degree
2 – Master's degree
3 – Bachelor's degree
4 – Associate's degree
5 – Postsecondary non-degree award
6 – Some college, no degree
7 – High school diploma or equivalent
8 – Less than high school

WORK EXPERIENCE CODES:

→ 5 years – 5 years' or more experience in a related occupation
< 5 years – Less than 5 years' experience in a related occupation or field is common
None – No work experience is typically required

ON-THE-JOB TRAINING:

I/R – Internship/residency
APP – Apprenticeship
LT OJT – Long-term on-the-job training
MT OJT – Moderate-term on-the-job training
ST OJT – Short-term on-the-job training
None – None

EXHIBIT A-9: LOS ANGELES AND ORANGE COUNTIES' SHARES OF CALIFORNIA EMPLOYMENT BY CREATIVE OCCUPATION, 2015					
		2015 EMPLOYMENT			
OCCUPATIONAL TITLE	SOC CODE	California	Los Angeles County	Orange County	LA/OC Share of California
Management Occupations					
Advertising and Promotions Managers	11-2011	3,950	1,480	390	47.3%
Marketing Managers	11-2021	32,800	6,300	3,630	30.3%
Public Relations and Fundraising Managers	11-2031	6,660	1,710	570	34.2%
Business and Financial Operations Occupations					
Agents and Business Managers of Artists, Performers, and Athletes	13-1011	4,910	4,380	100	91.2%
Computer and Mathematical Occupations:					
Software Developers, Applications	15-1132	123,950	15,220	9,900	20.3%
Software Developers, System Software	15-1133	82,370	10,790	7,100	21.7%
Architecture and Engineering Occupations					
Architects, Except Landscape and Naval	17-1011	12,070	3,860	1,270	42.5%
Landscape Architects	17-1012	3,340	340	1,010	40.4%
Architectural and Civil Drafters	17-3011	13,650	3,500	1,990	40.2%
Education, Training, and Library Occupations					
Architecture Teachers, Postsecondary	25-1031	510	220	---	43.1%
Anthropology and Archeology Teachers, Postsecondary	25-1061	530	130	40	32.1%
Area, Ethnic, and Cultural Studies Teachers, Postsecondary	25-1062	700	250	---	35.7%
Library Science Teachers, Postsecondary	25-1082	300	50	50	33.3%
Art, Drama, and Music Teachers, Postsecondary	25-1121	14,600	4,660	1,250	40.5%
Communications Teachers, Postsecondary	25-1122	3,110	1,180	350	49.2%
English Language and Literature Teachers, Postsecondary	25-1123	7,750	2,420	640	39.5%
Foreign Language and Literature Teachers, Postsecondary	25-1124	3,620	1,370	200	43.4%
History Teachers, Postsecondary	25-1125	1,650	430	160	35.8%
Archivists	25-4011	520	320	---	61.5%
Curators	25-4012	1,050	350	---	33.3%
Museum Technicians and Conservators	25-4013	1,400	640	50	49.3%
Librarians	25-4021	9,540	2,680	620	34.6%
Library Technicians	25-4031	9,820	1,830	850	27.3%
Audio-Visual and Multimedia Collections Specialists	25-9011	1,860	390	260	34.9%
Arts, Design, Entertainment, Sports, and Media Occupations					
Art Directors	27-1011	6,270	3,280	560	61.2%
Craft Artists	27-1012	370	575	760	360.8%
Fine Artists, Including Painters, Sculptors, and Illustrators	27-1013	3,100	1,390	160	50.0%
Multimedia Artists and Animators	27-1014	10,110	5,830	700	64.6%
Artists and Related Workers, All Other	27-1019	720	220	---	30.6%
Commercial and Industrial Designers	27-1021	4,110	1,730	520	54.7%
Fashion Designers	27-1022	6,180	4,020	600	74.8%
Floral Designers	27-1023	3,230	610	430	32.2%
Graphic Designers	27-1024	28,940	10,010	3,300	46.0%

EXHIBIT A-9: LOS ANGELES AND ORANGE COUNTIES' SHARES OF CALIFORNIA EMPLOYMENT BY CREATIVE OCCUPATION, 2015, CONTINUED

OCCUPATIONAL TITLE	SOC CODE	2015 EMPLOYMENT			
		California	Los Angeles County	Orange County	LA/OC Share of California
Merchandise Displayers and Window Trimmers	27-1026	10,050	1,980	2,190	41.5%
Designers, All Other	27-1029	1,530	1,010	190	78.4%
Actors	27-2011	17,090	14,560	545	88.4%
Producers and Directors	27-2012	25,510	19,560	580	78.9%
Dancers	27-2031	1,470	175	190	24.8%
Choreographers	27-2032	570	200	---	35.1%
Music Directors and Composers	27-2041	2,650	700	280	37.0%
Musicians and Singers	27-2042	6,380	2,810	800	56.6%
Radio and Television Announcers	27-3011	3,060	1,210	250	47.7%
Public Address System and Other Announcers	27-3012	880	350	---	39.8%
Broadcast News Analysts	27-3021	530	330	---	62.3%
Reporters and Correspondents	27-3022	3,630	1,600	170	48.8%
Public Relations Specialists	27-3031	22,820	7,130	1,570	38.1%
Editors	27-3041	9,920	4,060	760	48.6%
Technical Writers	27-3042	7,300	1,550	660	30.3%
Writers and Authors	27-3043	7,890	4,890	290	65.7%
Media and Communication Workers, All Other	27-3099	8,870	7,260	80	82.8%
Audio and Video Equipment Technicians	27-4011	13,060	7,670	1,020	66.5%
Broadcast Technicians	27-4012	3,950	2,150	240	60.5%
Sound Engineering Technicians	27-4014	4,260	3,100	240	78.4%
Photographers	27-4021	6,360	2,620	720	52.5%
Camera Operators, Television, Video, and Motion Picture	27-4031	5,110	4,360	---	85.3%
Film and Video Editors	27-4032	11,250	10,000	150	90.2%
Media and Communication Equipment Workers, All Other	27-4099	6,900	5,880	80	86.4%
Personal Care and Service Occupations					
Motion Picture Projectionists	39-3021	490	160	---	32.7%
Costume Attendants	39-3092	1,800	1,020	---	56.7%
Makeup Artists, Theatrical and Performance	39-5091	1,160	1,100	---	94.8%
Sales and Related Occupations					
Advertising Sales Agents	41-3011	18,520	8,040	1,890	53.6%
Office and Administrative Support Occupations					
Library Assistants, Clerical	43-4121	9,600	2,910	690	37.5%
Desktop Publishers	43-9031	1,520	560	150	46.7%
Installation, Maintenance, and Repair Occupations					
Electronic Home Entertainment Equipment Installers and Repairers	49-2097	2,310	590	---	25.5%
Camera and Photographic Equipment Repairers	49-9061	650	370	300	103.1%
Musical Instrument Repairers and Tuners	49-9063	540	170	---	31.5%
Watch Repairers	49-9064	240	---	---	0.0%

EXHIBIT A-9: LOS ANGELES AND ORANGE COUNTIES' SHARES OF CALIFORNIA EMPLOYMENT BY CREATIVE OCCUPATION, 2015, CONTINUED

		2015 EMPLOYMENT			
OCCUPATIONAL TITLE	SOC CODE	California	Los Angeles County	Orange County	LA/OC Share of California
Production Occupations					
Sewers, Hand	51-6051	1,340	493	160	48.7%
Tailors, Dressmakers, and Custom Sewers	51-6052	2,140	690	230	43.0%
Fabric and Apparel Patternmakers	51-6092	1,680	1,280	150	85.1%
Cabinetmakers and Bench Carpenters	51-7011	9,650	2,330	900	33.5%
Jewelers and Precious Stone and Metal Workers	51-9071	2,870	1,260	320	55.1%
Painting, Coating, and Decorating Workers	51-9123	1,390	310	130	31.7%
Photographic Process Workers and Processing Machine Operators	51-9151	3,160	640	330	30.7%
Etchers and Engravers	51-9194	810	240	120	44.4%
TOTALS:		**654,300**	**223,800**	**55,000**	**42.6%**
(Totals and percentages may not add up due to rounding)					

**Indicates data was unavailable
Source: Bureau of Labor Statistics, Occupational Employment Statistics: California EDD; estimates by IAE

EXHIBIT A-10: CALIFORNIA K–12 CREATIVE COURSES BY SUBJECT AREA

Agriculture and Natural Resources
Floriculture and floral design
Introduction to ornamental horticulture
Landscape design

Art
Advertising design
AP Art history
AP Studio art: drawing
AP Studio art: three dimensional
AP Studio art: two dimensional
Art appreciation (elementary school)
Art appreciation (secondary school)
Art history
Ceramics (beginning and advanced)
Cinematography/artistic videos (beginning)
Crafts
Design
Digital art/Computer art
Drawing
Fashion design
Fibers and textiles
Fundamentals of art (elementary school)
Fundamental of art (secondary school)
IB Visual arts
Jewelry
Lettering/Calligraphy
Multicultural art/Folk art
MYP (IB) Visual arts
Other art course
Painting
Photography (beginning or advanced)
Printmaking
Sculpture

Arts, Media, and Entertainment
Advanced cinema/Film/Video production
Advanced dance/Choreography
Advanced game design
Advanced graphic communications
Advanced professional music
Advanced theater performance
Arts management
Broadcast production
Broadcasting technology
Commercial art
Commercial photography
Film making
Film/Cinema/Video production
Game design
Intermediate animation
Intermediate dance performance
Intermediate game design
Intermediate graphic technology
Intermediate musical performance
Intermediate state technology
Intermediate theater performance
Internet publishing
Intro to animation
Intro to multimedia production
Intro to professional music
Intro to professional theater
Intro to graphic arts
Intro to media arts
Intro to stage technology
Other arts, media, and entertainment
Photographic laboratory and darkroom
Photography production and technology
Radio production
Stage design and production
Stage production
Television production
Three-dimensional design
Two-dimensional design
Visual art and related careers

Building and Construction Trades
Cabinet making
Furniture making
Introduction to woodworking principles
Millwork and cabinet manufacturing

Computer Education
MYP (IB) Design technology
Web design

Dance
Advanced dance study
Ballet, modern, jazz, world dance
Dance choreography and production
Dance, movement and rhythmic fund. (elementary)
Dance, movement and rhythmic fund. (secondary)
Folk/Traditional dance
Other dance course

Drama/Theater
Advanced theater
History/appreciation of theater art
IB Theater
Media/Film/Video/Television product
MYP (IB) Drama
Other drama/theater course
Technical theater/Stagecraft
Theater/Creative dramatics (elementary)
Theater/Creative dramatics (secondary)

Engineering and Architecture
Architectural and structural engineering
Computer-aided drafting/Design
Engineering design level 2
Engineering technology level 2
Environmental engineering level 2
Principles of design
Principles of engineering design
Principles of engineering technology
Principles of environmental and natural resources
Technical drafting

English Language Arts
Advanced composition
Composition
Journalism

Fashion and Interior Design
Apparel design and construction
Apparel manufacturing, production
Environmental design
Fashion and textile design
Fashion merchandising
Fashion, textiles and apparel
Housing and furnishings
Interior design, furnishings

Information and Communication Technologies
3D Media and construction
Computer graphics and media technology
Computer programming and game design
Game design and development
Graphic communications
Multimedia and animation

Manufacturing and Product Development
Advanced/Specialized graphic productions
Advanced/Specialized product design
Drafting/Computer aided Design
Exploring manufacturing and design
Graphic production technologies
Jewelry design, fabrication
Principles of manufacturing and design
Product development
Silk screen making and printing

Music
AP Music theory
Bank
Chorus/Choir/Vocal ensemble
Composition/Songwriting
Computers and electronics/Digital music
General/Exploratory/Introduction to Music
IB Music
Instrumental ensemble
Instrumental music lessons (elementary school)
Instrumental music lessons (secondary school)
Music appreciation/history/literature
Music theory
Musical theater
MYP(IB) Music
Orchestra/Symphony
Other music course
Voice class

AP = Advanced Placement
IB = International Baccalaureate
MYP = IB Middle Years Program

Source: California Department of Education

Download the full report, view highlights from the creative economy launch event, and learn more about other resources at **www.otis.edu/otisreport**

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