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THE 2020 REPORT ON THE VENTURA AND SANTA BARBARA CREATIVE ECONOMIES



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**The Economic Development Collaborative and the Ventura County Community Foundation
have commissioned this report by researcher and author:**

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WELCOME TO THE 2020 REPORT

On The Ventura And Santa Barbara Creative Economies

Introduction

This report on The Creative Economy in Ventura and Santa Barbara Counties makes an important and unique contribution to a more complete regional economic outlook by examining the economic impact of creativity in the Ventura and Santa Barbara Counties region.

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, this report offers an important look into an often overlooked and under-appreciated sector of the economy.

This report encourages investment in arts education, economic development and cultural planning as essential elements to a well-rounded regional economy.

COVID-19 Impact

In recognition of the coronavirus pandemic that has swept the world, it is important to note that this report was commissioned in late 2019, and completed in March 2020, just prior to the near complete shutdown of the region's economy. The creative sector and its workers have been particularly hard hit by the recession, both because many of the occupations in the creative economy are so dependent on consumer spending, but also because of how far-reaching creative occupations extend throughout the entirety of our economic fabric.

Though long delayed in releasing this study, what we have now is a complete picture of the region's creative economy just before the onset of COVID-19. As we move nearer to the end of the pandemic, this report and data will allow us both to secure a true measure of its impact to the diversity of jobs and businesses in the creative economy and provides a means of tracking our progress in recovery.

Moving forward, in recognition of the significance of the creative economy to our region's identity and competitiveness, it is critical that public, private and nonprofit leadership work together to help restore these jobs and develop strategies for improving the sector's resilience.

Acknowledgments

The Economic Development Collaborative commissioned this report from the Los Angeles Economic Development Corporation Institute for Applied Economics. Funding for the research had been generously provided by the Ventura County Community Foundation, for which we are eternally grateful.

The LAEDC Institute for Applied Economics offers objective economic and policy research for public agencies and private firms, focusing on economic impact studies, regional industry analyses, economic forecasts and issue studies, particularly in water, transportation, infrastructure and environmental policy. For more on the Institute, see <https://laedc.org/research-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.

EXECUTIVE SUMMARY



Forming the South Central Coast of California, the counties of Santa Barbara and Ventura are both homes to a variety of industries that together compose the South Central Coast creative economy. Taken as a region, creative employment in Santa Barbara and Ventura Counties numbered 10,330 salary and wage employees in 2018, a slight decline of one percent between 2013 and 2018.

Direct labor income in the creative industries of the South Central Coast region added up to \$1.57 billion in 2018. Creativity is highly individual, so the creative economy is also driven by self-employed creative workers. In 2017 (latest data available), there were 11,450 self-employed persons working in the creative industries in Santa Barbara and Ventura Counties earning revenues of \$443.5 million.

As generators of significant regional output and income, creative economy jobs were just one part of a much larger employment effect in Santa Barbara and Ventura Counties. 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 additional jobs in the region that are outside the creative sector.

THE VENTURA AND SANTA BARBARA CREATIVE ECONOMIES

Size of Industry in 2018:

- Over 10,300 direct payroll jobs
- Direct labor income of just under \$1.6 billion
- 11,450 nonemployer firms (2017)
- Nonemployer revenues of \$443.5 million (2017)

Total Economic Impact:

- Sustains more than 38,000 total jobs
 - Over 5 percent of total employment in both counties
- Associated labor income of \$2.5 billion
- Generates over \$6.5 billion in total economic output
- Contributes 5.2 percent to the region's GRP
- Over \$340 million in fiscal revenue

The combined direct, indirect, and induced employment in the creative industries of Santa Barbara and Ventura totaled 38,020 jobs in 2018, or over 5 percent of the joint total employment of both counties. The labor income earned by these workers was \$2.46 billion.

Activity in the creative sector triggers not only jobs and spending, but it also generates significant tax revenues for state and local government that help fund local services like education, public recreation spaces and public safety. Property taxes and state and local personal income and sales taxes generated directly and indirectly by the creative industries were \$340.2 million across the region in 2018.

The creative industries of Santa Barbara and Ventura Counties also generated over \$6.5 billion in economic output. Of that, almost \$4.0 billion was value-added (corporate profits and labor income). This net economic contribution was the equivalent of 5.2 percent of the region's gross product (GRP) in 2018. In Santa Barbara County, the creative industries contributed significantly more to the overall economy, generating 7.5 percent of the county's gross county product (GCP) in 2018, as compared to contributing 3.8 percent of Ventura County's GCP.

Based on economic modeling developed by LAEDC, we project employment growth in several of the creative industries in each county. In Santa Barbara, the fastest-growing creative industries are forecasted to be digital media, arts education and architecture, and interior design. In Ventura County, these industries are predicted to be digital media, visual and performing arts, and arts education.

The creative industries make a significant contribution to employment and economic growth in the South Central Coast region. They generate entrepreneurship and encourage spillover effects that create opportunities for other industries. The region's creative industries help move the economy forward by attracting investment, tourism, consumer spending, and by generating tax revenues. In our postindustrial society, activities based on creativity and culture are an essential component of a robust economy.

WHAT IS THE CREATIVE ECONOMY?

The creative economy is the sub-section of the economy which focuses on artistic, innovative, and original activities. Comprised of both services and manufactured goods, the creative economy has taken off in recent years with the upsurge of globalization and technological growth. While not commonly acknowledged, it would be nearly impossible to live one's life in any urban environment without being impacted by the vast creative economy.

The creative industries in this report include:

- Architecture/Interior Design
- Art Galleries
- Publishing & Printing
- Communication Arts
- Visual & Performing Arts Providers
- Industrial Design Services
- Entertainment
- Fashion
- Toys
- Furniture/Decorative Arts
- Digital Media
- Fine & Performing Arts Schools

These 12 "super sectors" are divided into 57 subsectors, which are identified in the "Industry Snapshots," section 2.2 and in the Appendix.

There are several ways to measure the size and economic contribution of the creative economy to Santa Barbara County, Ventura County, and in the state of California. In this report, employment, wages, and output are the primary indicators. Indicators not used include intellectual property and the rights and ownership surrounding it. While important, intellectual property data is sparse and incomplete, and the nuance required for such an analysis is beyond the scope of this report.

I. CREATIVE INDUSTRY TRENDS



EMPLOYMENT

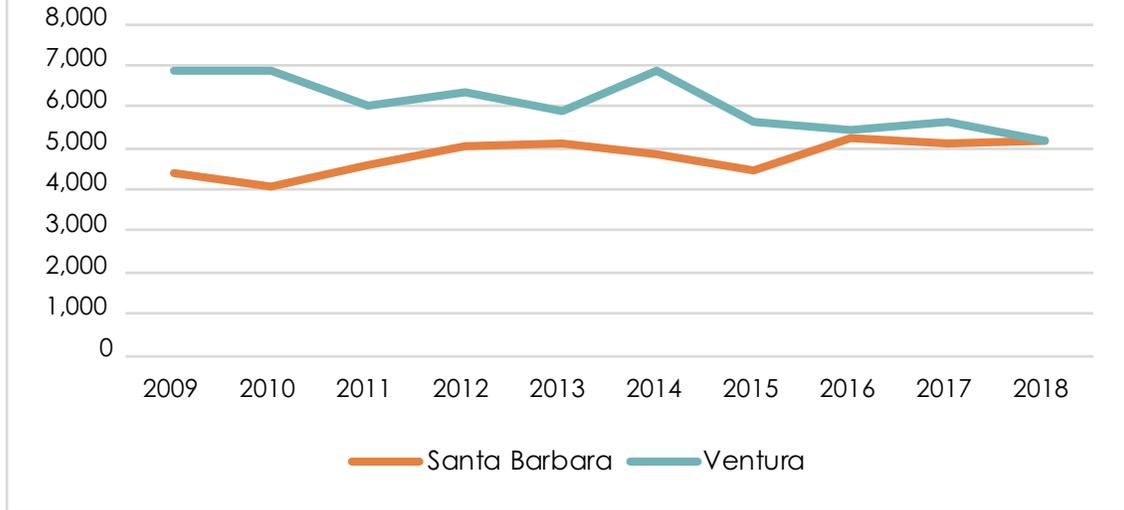
To contextualize the Santa Barbara and Ventura Counties creative economy within the statewide creative economy, the creative industries in California employed over 1 million full-time employees in 2018, an increase of 12.7 percent from 2017. The largest creative industry sectors in the state are jointly entertainment and digital media (743,000 jobs), which employ 70 percent of wage and salary workers and 80 percent of contractors.¹

In 2018, the creative industries in Santa Barbara County employed 5,170 salary and wage workers, which was an increase of 0.7 percent compared with 2017. By major industry sector, the largest employment counts in 2018 were in digital media (1,820 jobs), publishing and printing (690 jobs), and architecture and interior design (650 jobs). In Santa Barbara County, digital media was the largest creative industry by employment, capturing over 33 percent of creative salary and wage jobs.

In Ventura County, 5,150 residents were employed in salary and wage jobs in local creative industries. Creative industry employment in Ventura County declined by 8.1 percent (450 jobs) from 2017. In Ventura County, publishing and printing constituted the largest creative industry with 22.1 percent of creative employment. However, publishing and printing does not generate the largest portion of creative employment income, reflecting that some creative industries remunerate at higher rates than others.

Exhibit 1-1: Salary and Wage Creative Employment
Santa Barbara and Ventura

Source: BLS 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 from salary and wage employees in the creative industries of Santa Barbara and Ventura Counties totaled over \$1.5 billion in 2018. At \$386 million, the entertainment industry contributed by far the largest share in the combined two-county region (24.6 percent) to total creative industry payrolls. Digital media was the regional second at \$274.1 million (17.5 percent), followed by communication arts at \$173.2 million (11.0 percent). These wage estimates are a combination of estimated wages from both payroll employees and the self-employed.

Exhibit 1-2: Creative Economy Wages (\$ millions)

Creative Industry	Ventura County	% of Total	Santa Barbara County	% of Total	Regional Total	% of Total
Architecture & Interior Design	\$86.70	10.6%	\$109.60	14.6%	\$196.20	12.5%
Art Dealers	\$2.30	0.3%	\$2.80	0.4%	\$5.10	0.3%
Communication Arts	\$93.70	11.4%	\$79.50	10.6%	\$173.20	11.0%
Digital Media	\$24.90	3.0%	\$249.20	33.3%	\$274.10	17.5%
Entertainment	\$296.20	36.1%	\$89.70	12.0%	\$386.00	24.6%
Fashion	\$77.00	9.4%	\$33.10	4.4%	\$110.10	7.0%
Furniture & Decorative Arts	\$53.90	6.6%	\$54.10	7.2%	\$108.00	6.9%
Industrial Design Services	\$7.00	0.9%	\$1.30	0.2%	\$8.30	0.5%
Publishing & Printing	\$83.80	10.2%	\$49.10	6.6%	\$132.90	8.5%
Toys	\$14.30	1.7%	\$2.00	0.3%	\$16.20	1.0%
Visual & Performing Arts Providers	\$75.10	9.2%	\$72.60	9.7%	\$147.80	9.4%
Fine & Performing Arts Schools	\$4.80	0.6%	\$5.40	0.7%	\$10.10	0.6%
Total Creative Industry	\$819.80	100.0%	\$748.40	100.0%	\$1,568.10	100.0%

COUNTING THE SELF-EMPLOYED

A significant share of those working in creative industries opt for self-employment. Despite their importance to the creative economy, their activities are not captured in the federal and state employment data used to develop most of the job numbers in this report. The Internal Revenue Service (IRS), however, does collect data on people who are classified as nonemployer firms. These are firms consisting of one person with revenues but no additional employees. The latest nonemployer data from the IRS is for tax year 2017. 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 2017 there were 4,138 creative nonemployer firms in Santa Barbara County and 7,538 creative non-employer firms in Ventura County. Over the five-year period from 2012 through 2017, creative self-employment in Santa Barbara County increased at an average annual rate of 2.6 percent (478 jobs in total) and by 2.5 percent (847 jobs) in Ventura County.

In both counties visual and performing arts providers make up the largest sector of nonemployer firms, particularly the subsector of independent artists, writers, and performers. Many self-employed individuals also appeared in the communication arts sector as specialized design service providers, an industry category which includes those engaged in graphic, interior, and industrial design services. Complete data for the region and for each county from 2012 through 2017 can be found in the Appendix.

Revenues earned by non-employer firms in Santa Barbara County reached almost \$152 million in 2017 with the largest portion, 32.6 percent, of that total generated by visual and performing arts providers, especially independent artists and writers. Since 2012, revenues have increased at an average annual rate of 3.5 percent. In Ventura County, revenues were just over \$291.5 million, increasing at an average annual rate of just over 4.9 percent between 2012 and 2017. Similar to its northern neighbor, Ventura County's largest group of self-employed creatives by receipts were visual and performing arts providers. Complete data for the region and for each county from 2012 through 2017 can be found in the Appendix.

In certain sectors, self-employment is more common than wage and salary employment (Exhibit 1-3). In the visual and performing arts, there were over 3.7 self-employed persons in Santa Barbara County for every salaried worker. In Ventura County, the ratio was even more significant at nearly eight to one. The communication arts also had a high number of self-employed workers relative to salaried employees. In 2017, there were 2.9 self-employed persons in Santa Barbara County for every salaried employee, while in Ventura County there were 3.9 single-person firms for each salaried worker in the communication arts industry.

Exhibit 1-3: Ratio of Creative Self-Employed to Wage and Salary Employees by Sector

Industry Sector	Ventura County			Santa Barbara County		
	Wage & Salary Employees	Self-Employed	Ratio	Wage & Salary Employees	Self-Employed	Ratio
Architecture & Interior Design	409	771	1.9	648	560	0.9
Art Dealers	21	55	2.6	36	48	1.3
Communication Arts	422	1,632	3.9	317	919	2.9
Digital Media	340	-	-	1,822	-	-
Entertainment	394	1,071	2.7	459	387	0.8
Fashion	613	182	0.3	250	112	0.4
Furniture & Decorative Arts	875	89	0.1	502	76	0.2
Industrial Design Services	131	-	-	24	-	-
Publishing & Printing	1,140	330	0.3	686	213	0.3
Toys	170	23	0.1	16	13	0.8
Visual & Performing Arts Providers	440	3,501	8	514	1,887	3.7
Fine & Performing Arts Schools	200	-	-	182	-	-
Total	5,155	7,654	1.5	5,456	4,215	0.8

II.1 ECONOMIC CONTRIBUTION OF THE CREATIVE ECONOMY INDUSTRIES

EMPLOYMENT AND WAGES

Direct job counts in the creative industries are notable in and of themselves. However, they support an even larger employment network through indirect and induced effects. Direct employees are those who work within the creative industries. 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. Every creative economy job supports or sustains other jobs both in the Santa Barbara and Ventura County region and the state.

The ripple effect is substantial, giving rise to job gains and increases in income across a wide range of industries throughout the regional economy.

Every creative economy job supports or sustains other jobs both in the Santa Barbara and Ventura County region and the state.

TAX EFFECTS

Activity in the creative sectors triggers not only jobs and spending, but it also results in tax revenues for state and local government that help to fund local services such as education and public safety. As with jobs, there is a ripple effect with tax revenues because the initial direct effects give rise to indirect and induced effects. The LAEDC calculated tax effects attributable directly and indirectly to the creative industries, including property tax, state and local income tax, and sales tax revenues.

In Santa Barbara and Ventura Counties, property taxes, state and local personal income taxes, and sales taxes generated by the creative industries were \$340.2 million in 2018. In the state overall, \$30.9 billion in state and local tax monies can be attributed to the creative economy.²

THE ECONOMIC IMPACT OF THE CREATIVE INDUSTRIES

In terms of their overall contribution to the regional economy, the creative industries of Santa Barbara and Ventura Counties generated \$6.5 billion in economic output in 2018, which is just over five percent of the combined output of both counties. Creative industries contribute significantly more to Santa Barbara's gross county product (7.5 percent) compared to that of Ventura County (3.8 percent). By comparison, payroll creative employees make up 5.3 percent of California's workforce.

Exhibit 2-1: Economic Impact of the Creative Industries

Economic Impact	Ventura County	Santa Barbara County	South Central Coast Region
Total creative industries output (\$ millions)	\$3,090.60	\$3,457.00	\$6,547.60
Creative industries value-added (\$ millions)	\$1,818.60	\$2,137.10	\$3,955.70
Total gross county product (\$ millions)	\$47,309.20	\$28,388.30	\$75,697.50
Creative industries value-added as share of gross county product	3.80%	7.50%	5.20%

II.2 INDUSTRY SNAPSHOTS

The following sections provide snapshots of the twelve creative industries covered in this report. For each industry, forecasts for payroll employment and job and wage growth are provided. Additionally, 2018 estimates for payroll establishments, direct employment, and direct employment wages are provided alongside estimates for the self-employed (classified as nonemployer establishments).

The wage estimates in the snapshots starting on page 12 will differ from those given in Exhibit 1-2 since those given in the snapshots are only payroll employment wage estimates. Those given in Exhibit 1-2 included self-employed income estimates provided by IMPLAN. Finally, the total impacts of each creative industry (direct, indirect, and induced), which include both payroll employment and the self-employed, are given.

As is true of any two distinct regions, the creative economies of Santa Barbara and Ventura Counties naturally differ from one another. In order to enable better interpretation of the following snapshots, the top five creative industries of both counties are described in brief, which in both counties compose over 78 percent of the creative economy. The most important creative industries for each county are determined by their contribution to creative employment and wages.

SANTA BARBARA COUNTY CREATIVE INDUSTRIES

In Santa Barbara County, the largest creative industries by wage are digital media, architecture and interior design, entertainment, communication arts, and visual and performing arts. By employment, the most important creative industries in the county are all of the former except entertainment, which is replaced by publishing and printing as a top creative industry.

Architecture and Interior Design

The architecture and interior design industry provides over 14 percent of direct creative wages in Santa Barbara County, including both the self-employed and payroll workers, and over 12 percent of creative employment in the county. Most of these jobs are in architectural services and landscape design services, both of which are services that cater mainly to the local population.

Communication Arts

Communications arts, which are mainly concerned with various forms of advertising and marketing, employ almost 13 percent of Santa Barbara's creative workers and pay almost 11 percent of creative wages. Most of these jobs are related to advertising, with a small number of graphic designers also calling Santa Barbara home.

Digital Media

Defined as software publishers, the digital media industry in Santa Barbara employs 19 percent of the county's creative workers but pays one third of creative wages. Digital media employment in Santa Barbara is also spread across relatively few firms, with roughly 114 payroll workers per digital media establishment, compared to 13 payroll workers per digital media firm in Ventura County.

Entertainment

Entertainment is a unique creative industry in Santa Barbara in that it provides 12 percent of creative economy wages but only 7.6 percent of creative economy employment in the county, meaning entertainment is a top creative wage generator but not a top employer. Like digital media, entertainment payroll employment in Santa Barbara County is more concentrated with nine employees per firm as compared to Ventura County with three employees per entertainment firm. This is likely due to payroll entertainment employment in Santa Barbara being mainly television broadcasting. By contrast, self-employed entertainment professionals in the county are almost all engaged in motion picture and video production or sound recording.

Visual and Performing Arts

The visual and performing arts industry in Santa Barbara employs 25 percent of its creative workers and pays almost 10 percent of creative wages. Visual and performing arts is often a top creative industry for any location since it includes subsectors as diverse as museums, theater companies, music groups and independent musicians, artists and performers. Payroll employment in visual and performing arts in Santa Barbara is mostly split between museum employment and independent artists, whereas self-employed creatives in this industry are almost entirely in the independent artist category.

Publishing and printing

Contrapositive to entertainment, publishing and printing is among the top five creative industries in Santa Barbara County for employment but not for wages. Indeed, this industry employs over nine percent of creative workers in the county but pays less than seven percent of creative wages. Payroll employment in this industry is largely balanced between printers, newspaper publishers, periodical publishers and book publishers. Among the self-employed, this industry is dominated by freelance newspaper, periodical, and book publishers.

VENTURA COUNTY CREATIVE INDUSTRIES

In Ventura County, the largest creative industries by wages are entertainment, communication arts, architecture and interior design, publishing and printing, and visual and performing arts providers. By employment, the largest concentration of jobs includes a different mix of subsectors, led in order by publishing and printing, furniture and decorative arts, fashion, and visual and performing arts providers.

Architecture and Interior Design

The architecture and interior design industry in Ventura County provides over 10 percent of creative economy wages and almost as much in creative employment in the county. As is the case with this industry in Santa Barbara County, architecture and interior design in Ventura is a population-serving industry largely composed of architectural services and landscape design. This is the case for both payroll employment and freelancers in this industry.

Communication Arts

In Ventura County, employment in communications provides over 11 percent of creative economy wages and over 16 percent of creative employment. The communications arts industry in Ventura is marked by slightly smaller firms, as measured by the average number of employees, compared to Santa Barbara. However, Ventura has almost twice the number of self-employed creatives in communication arts as Santa Barbara, likely due to many residents of Ventura County working in Los Angeles or with clients in Los Angeles.

Entertainment

Unlike Santa Barbara, the entertainment industry in Ventura County is both a top five creative industry employer by both wages and total employment. Indeed, entertainment pays over 36 percent of creative economy wages and 10 percent of creative employment in Ventura. This preeminence, especially in terms of wages, of entertainment in Ventura is likely due to the county's proximity to Hollywood and Los Angeles. The industry is marked by relatively small firms with roughly three payroll employees per firm, distinguishing it from the higher firm concentration in Santa Barbara. However, the entertainment industry in Ventura has a much higher population and proportion of entertainment freelancers, most of whom work in motion pictures and sound recording.

Fashion

The fashion industry in Ventura County is among the top five creative employers by wages, providing over nine percent of creative wages, but not in terms of employment. This is analogous to the entertainment industry in Santa Barbara. The fashion industry in Ventura is largely apparel and footwear wholesalers, with some employment also in apparel manufacturing. The fashion industry has only a small number of self-employed in Ventura, most of whom are apparel or jewelry wholesalers.

Publishing and printing

Unlike Santa Barbara County, the publishing and printing industry in Ventura County is both a top creative employer in terms of total employees and wages paid. This industry accounts for over 11 percent of Ventura's creative employment and over 10 percent of creative wages, with printing and related services forming the majority of payroll employment while most freelancers in this industry are engaged in publishing.

Visual and Performing Arts

The visual and performing arts industry in Ventura County is the largest creative employer in the county but not even among the top five creative industries in terms of wages. Indeed, the industry employs over 31 percent of creatives in the county but pays only nine percent of the wages. Payroll employees in this industry are largely split between theater companies and independent artists whereas the self-employed are almost exclusively independent artists, writers and musicians. Ventura County also has a far higher concentration of self-employed visual and performing artists compared to Santa Barbara County, with eight freelancers in this industry for every one payroll employee. As is the case with many other creative industries in Ventura, this prevalence of self-employed visual and performing artists is likely due, at least in part, to the county being adjacent to Los Angeles County.

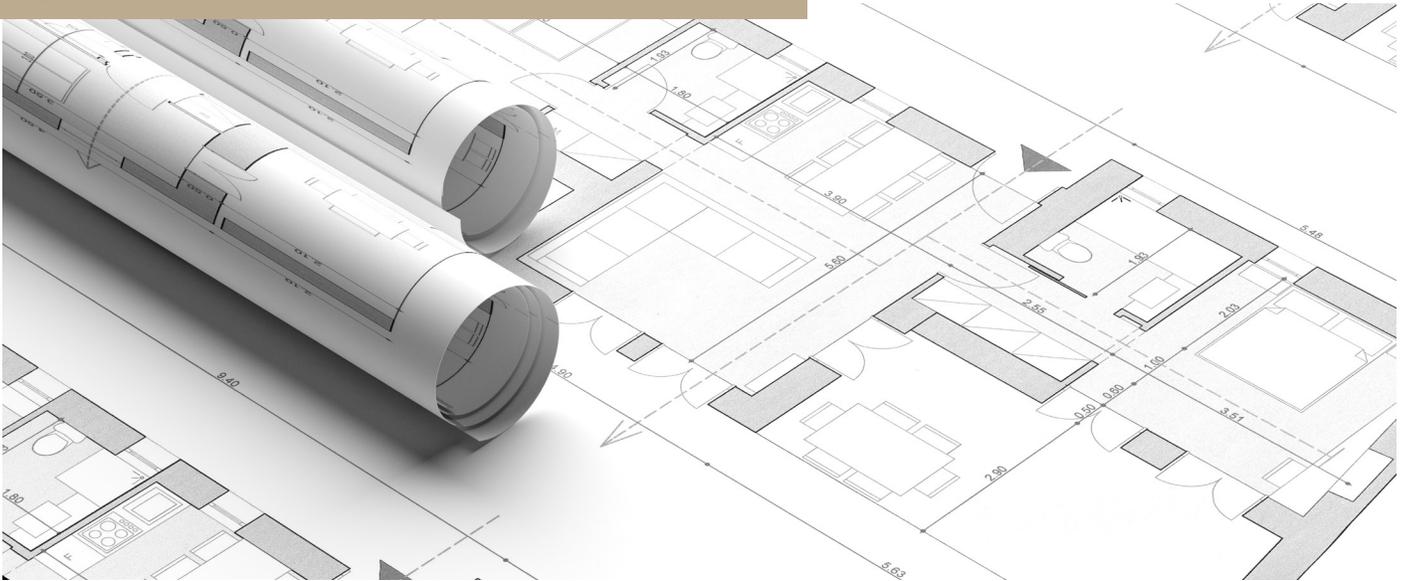
NAICS CODES

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.³ The following snapshots define the twelve creative industries used to define the creative economy in the counties of Santa Barbara and Ventura in terms of NAICS codes.



³ For the following industry snapshots, the 2022 figures are denoted as forecasts by the "f".

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	54141	Interior Design
54132	Landscape Design	332323	Ornamental and Architectural Metal Work Manufacturing
54134	Drafting Services		

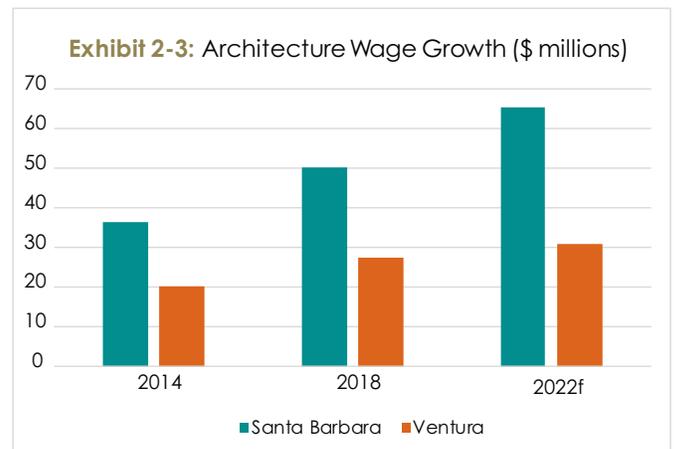
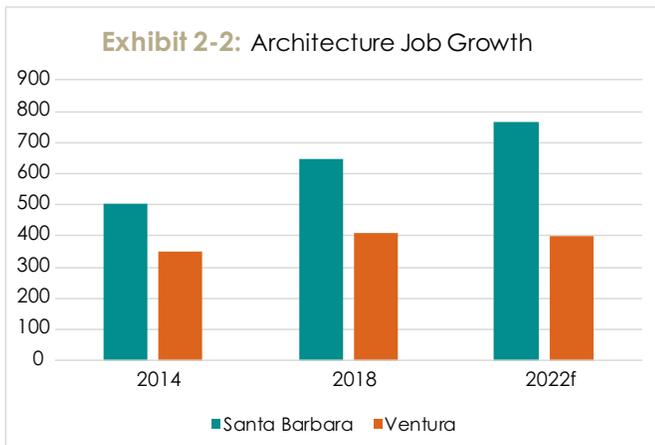
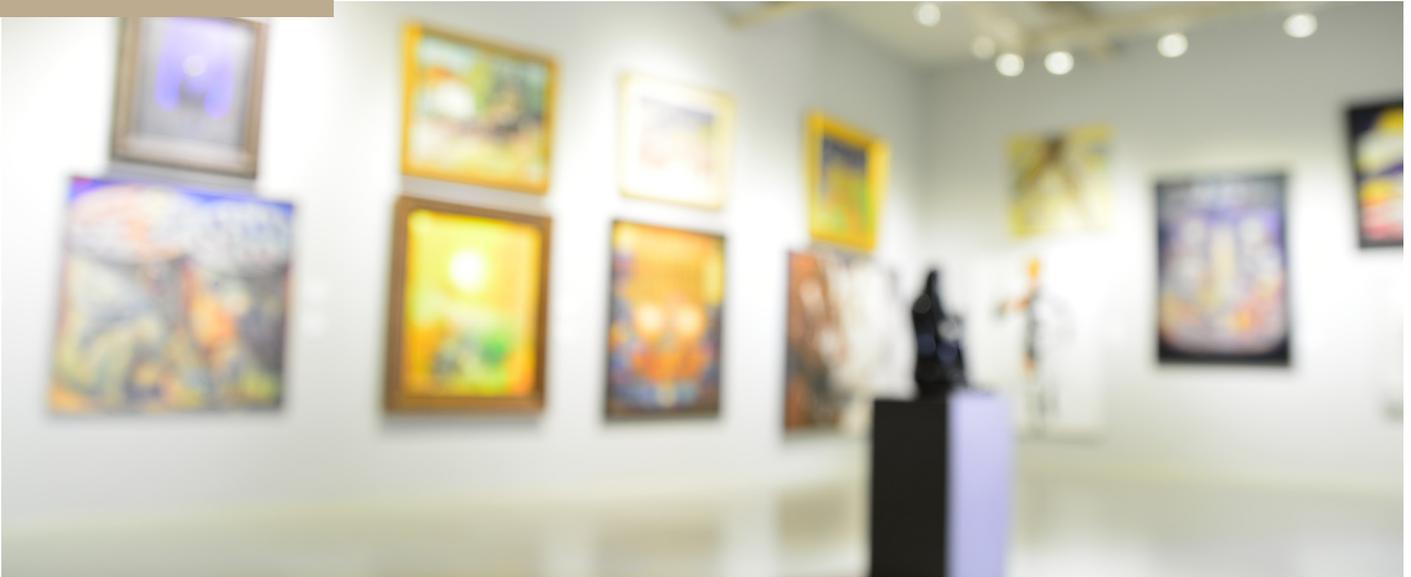


Exhibit 2-4: Economic Impact of the Architecture Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	116	124	240
Jobs	648	409	1,057
Labor Income (\$ millions)	\$50.50	\$27.60	\$78.00
Nonemployer Establishments, 2017	312	366	678
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$357.20	\$293.00	\$650.20
Total Jobs	2,128	2,003	4,131
Total Labor Income (\$ millions)	\$165.20	\$132.30	\$297.60
Total Taxes, State & Local (\$ millions)	\$14.00	\$12.70	\$26.70

ART GALLERIES



This industry comprises establishments primarily engaged in retailing original and limited-edition art works. Included in this industry are establishments primarily engaged in displaying works of art for retail sale in art galleries.

NAICS **DESCRIPTION**
45392 Art Galleries

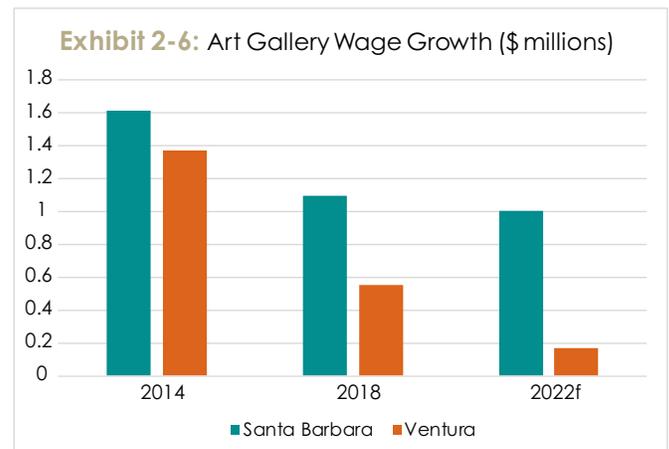


Exhibit 2-7: Economic Impact of the Architecture Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	12	13	25
Jobs	36	21	57
Labor Income (\$ millions)	\$1.10	\$0.60	\$1.60
Nonemployer Establishments, 2017	48	55	103
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$8.70	\$7.60	\$16.30
Total Jobs	105	95	200
Total Labor Income (\$ millions)	\$4.00	\$3.40	\$7.40
Total Taxes, State & Local (\$ millions)	\$1.00	\$0.90	\$2.00

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

541921

Photography Studios, Portrait

54181

Advertising Agencies

541922

Commercial Photography

Exhibit 2-8: Communications Arts Job Growth

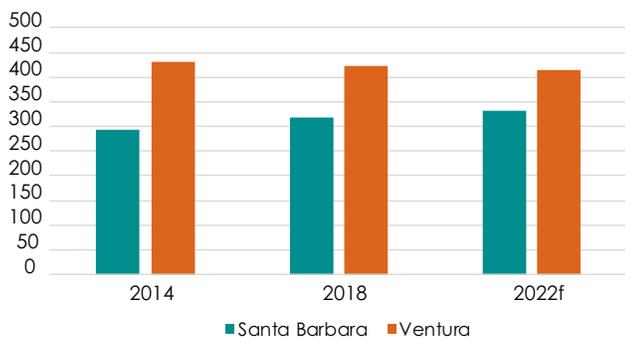


Exhibit 2-9: Communications Arts Wage Growth (\$ millions)



Exhibit 2-10: Economic Impact of Communications Arts Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	51	109	160
Jobs	317	422	739
Labor Income (\$ millions)	\$29.80	\$22.90	\$52.80
Nonemployer Establishments, 2017	1,167	2,037	3,204
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$257.10	\$320.90	\$578.00
Total Jobs	1,931	3,062	4,993
Total Labor Income (\$ millions)	\$119.00	\$145.80	\$264.70
Total Taxes, State & Local (\$ millions)	\$12.10	\$17.20	\$29.40

DIGITAL MEDIA



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

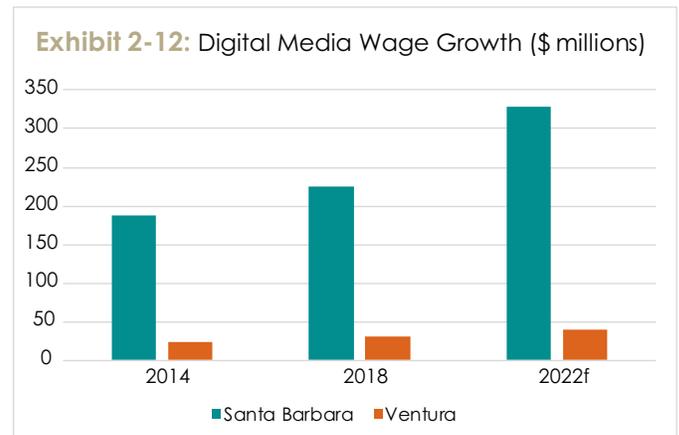
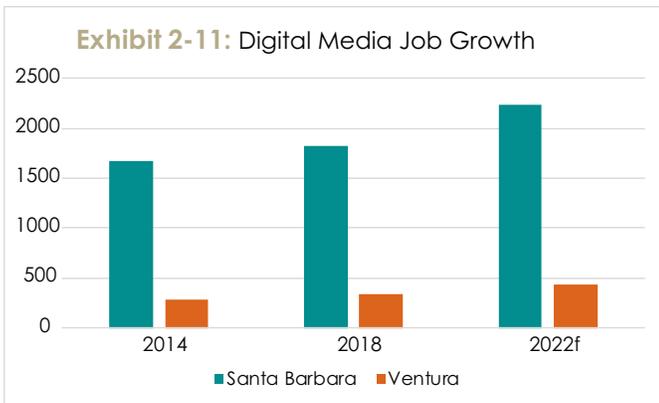


Exhibit 2-13: Economic Impact of Digital Media Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	16	26	42
Jobs	1,822	340	2,162
Labor Income (\$ millions)	\$225.20	\$30.80	\$256.00
Nonemployer Establishments, 2017	N/A	N/A	N/A
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$1,106.60	\$123.60	\$1,230.20
Total Jobs	3,475	574	4,049
Total Labor Income (\$ millions)	\$353.40	\$38.80	\$392.20
Total Taxes, State & Local (\$ millions)	\$41.60	\$5.80	\$47.40



The entertainment industry includes establishments involved in the production and distribution of motion picture and sound recordings. Southern California's regional creative economy is dominated largely by the entertainment industry in Los Angeles. As neighboring Counties, Santa Barbara and Ventura benefit from L.A.'s influential industry.

NAICS	DESCRIPTION	NAICS	DESCRIPTION
51211	Motion Picture/Video Production	515112	Radio Stations
51212	Motion Picture Distribution	515120	Television Broadcasting
51219	Postproduction Services	5152	Cable Broadcasting
5122	Sound Recording		

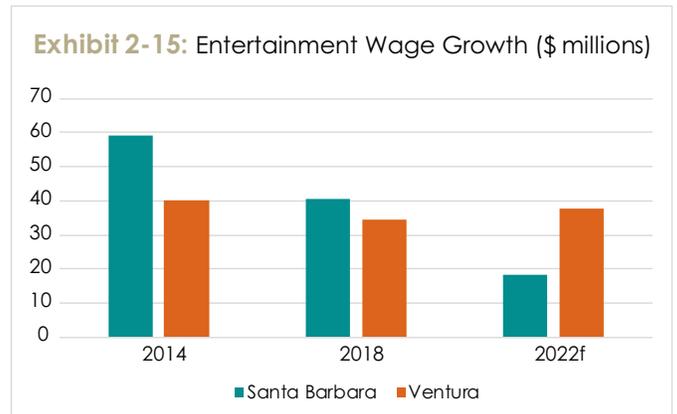
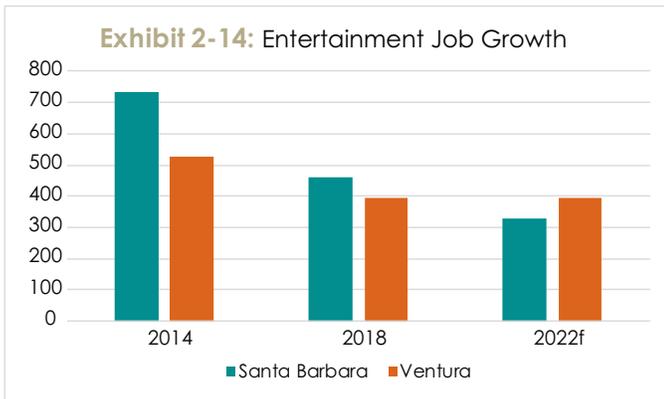


Exhibit 2-16: Economic Impact of the Entertainment Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	50	135	185
Jobs	459	394	853
Labor Income (\$ millions)	\$40.60	\$34.50	\$75.10
Nonemployer Establishments, 2017	262	889	1,151
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$828.30	\$918.60	\$1,746.90
Total Jobs	2,826	3,682	6,508
Total Labor Income (\$ millions)	\$197.80	\$436.40	\$634.20
Total Taxes, State & Local (\$ millions)	\$27.60	\$55.30	\$82.90

FASHION



Apparel design, manufacturing, and wholesaling make significant contributions to Santa Barbara and Ventura Counties' economies. Fashion is closely linked to the entertainment industry and California's thriving art scene.

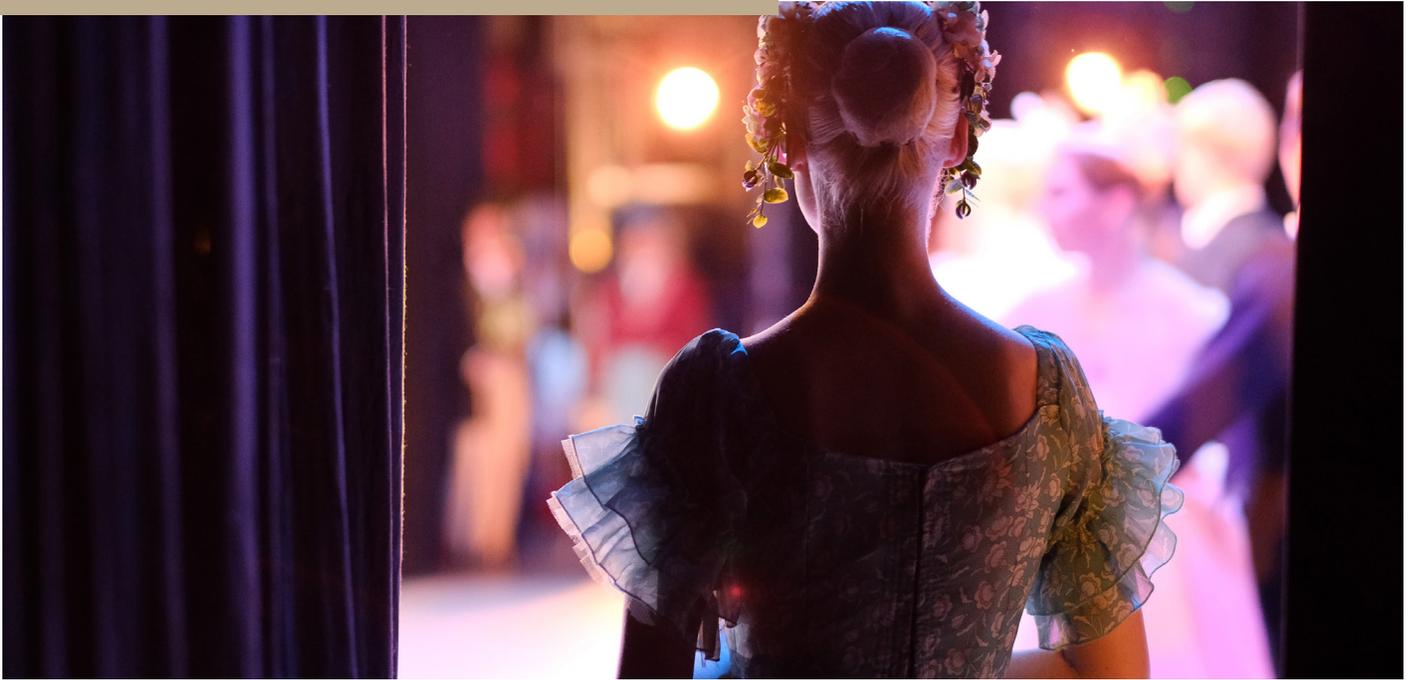
NAICS	DESCRIPTION		
313	Textile Mills Manufacturing	316992	Women's Handbag Manufacturing
315	Apparel Manufacturing	32562	Cosmetics Manufacturing
4243	Apparel Wholesaling	33991	Jewelry Manufacturing
3162	Footwear Manufacturing	42394	Jewelry Wholesaling
42434	Footwear Wholesaling	54149	Other Specialized Design Services



Exhibit 2-19: Economic Impact of the Fashion Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	32	72	104
Jobs	250	613	863
Labor Income (\$ millions)	\$23.40	\$38.80	\$62.20
Nonemployer Establishments, 2017	160	248	408
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$154.20	\$382.70	\$536.90
Total Jobs	770	1,778	2,548
Total Labor Income (\$ millions)	\$55.80	\$133.90	\$189.70
Total Taxes, State & Local (\$ millions)	\$16.30	\$47.70	\$64.10

FINE AND PERFORMING ARTS SCHOOLS



Fine performing arts schools consists of more than just drama and music instruction. Dance, photography, and sculpture instruction are some of the many fine arts schools included in this industry super-sector.

NAICS	DESCRIPTION
61161	Fine Performing Arts Schools

Exhibit 2-20: Fine Performace Art Schools Job Growth

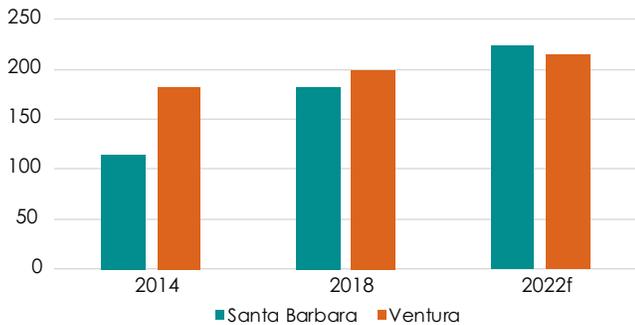


Exhibit 2-21: Fine Performace Art Schools Wage Growth (\$ millions)

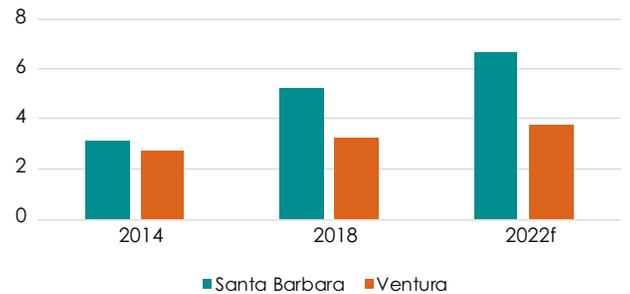


Exhibit 2-22: Economic Impact of the Fine & Performing Art Schools Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	29	31	60
Jobs	182	200	382
Labor Income (\$ millions)	\$5.20	\$3.30	\$8.50
Nonemployer Establishments, 2017	N/A	N/A	N/A
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$17.90	\$17.60	\$35.60
Total Jobs	230	249	479
Total Labor Income (\$ millions)	\$8.20	\$7.40	\$15.60
Total Taxes, State & Local (\$ millions)	\$0.90	\$0.90	\$1.80

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.

NAICS	DESCRIPTION	NAICS	DESCRIPTION
314	Textile Product Mills	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 2-23: Furniture & Decorative Arts Job Growth



Exhibit 2-24: Furniture & Decorative Arts Wage Growth (\$ millions)

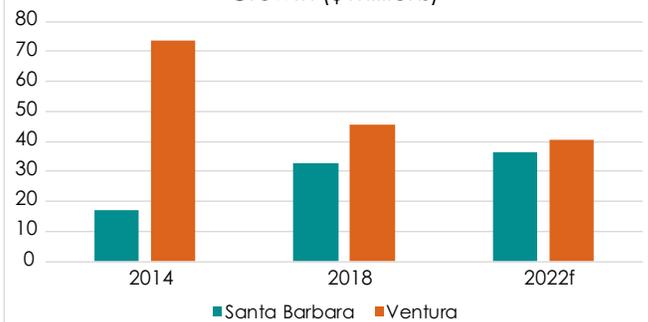


Exhibit 2-25: Economic Impact of the Furniture & Decorative Arts Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	27	77	104
Jobs	502	875	1,377
Labor Income (\$ millions)	\$32.90	\$45.50	\$78.40
Nonemployer Establishments, 2017	76	89	165
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$222.70	\$265.20	\$487.90
Total Jobs	1,007	1,576	2,583
Total Labor Income (\$ millions)	\$81.60	\$89.70	\$171.30
Total Taxes, State & Local (\$ millions)	\$9.30	\$14.40	\$23.70

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

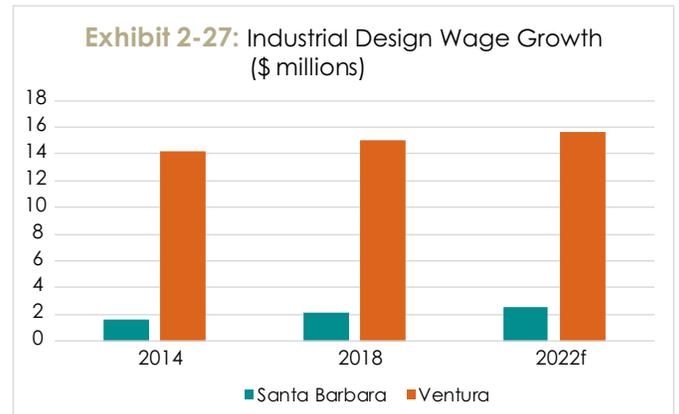
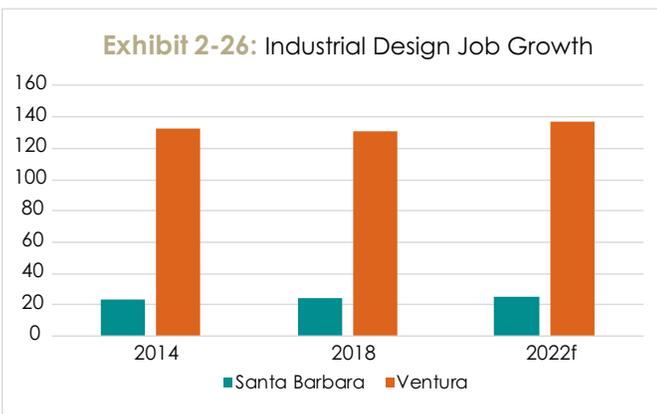


Exhibit 2-28: Economic Impact of the Industrial Design Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	5	9	14
Jobs	24	131	155
Labor Income (\$ millions)	\$2.20	\$15.00	\$17.20
Nonemployer Establishments, 2017	N/A	N/A	N/A
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$3.00	\$16.00	\$19.00
Total Jobs	31	173	204
Total Labor Income (\$ millions)	\$1.80	\$9.30	\$11.00
Total Taxes, State & Local (\$ millions)	\$0.20	\$1.00	\$1.20

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	NAICS	DESCRIPTION
3231	Printing And Support Activities	511191	Greeting Card Publishers
424920	Book, Periodical, Newspaper Wholesalers	511199	All Other Publishers
511110	Newspaper Publishers	519120	Libraries and Archives
511120	Periodical Publishers	519130	Internet Publishing and Broadcasting
511130	Book Publishers		

Exhibit 2-29: Publishing & Printing Job Growth

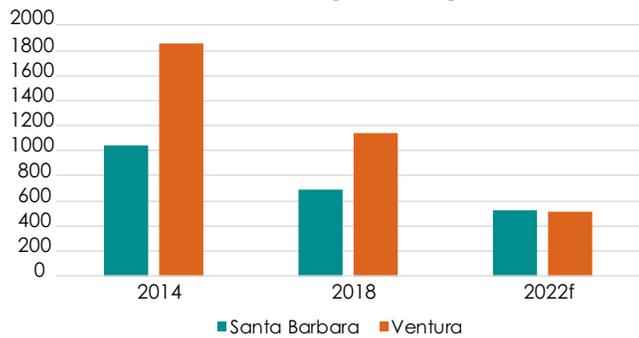


Exhibit 2-30: Publishing & Printing Wage Growth (\$ millions)

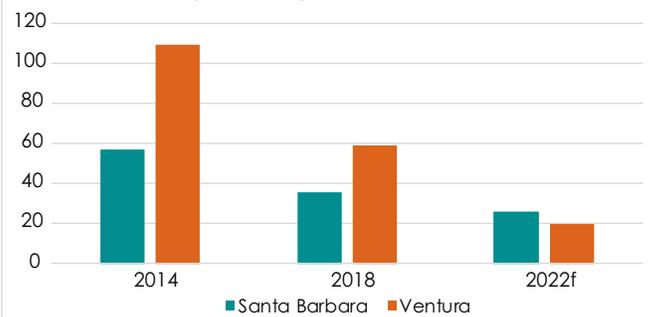


Exhibit 2-31: Economic Impact of the Publishing & Printing Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	60	98	158
Jobs	686	1,140	1,826
Labor Income (\$ millions)	\$35.20	\$58.80	\$94.00
Nonemployer Establishments, 2017	213	330	543
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$277.80	\$397.40	\$675.30
Total Jobs	1,520	2,359	3,879
Total Labor Income (\$ millions)	\$93.40	\$134.00	\$227.40
Total Taxes, State & Local (\$ millions)	\$11.00	\$16.90	\$27.90



This industry comprises establishments involved in the manufacturing of or merchant wholesale distribution of games, toys, hobby goods, and related goods. Much of the actual manufacturing takes place outside of the region but the design and marketing functions of this industry provide opportunities for creative workers.

NAICS	DESCRIPTION
33993	Toy Manufacturing
42392	Toy Wholesaling

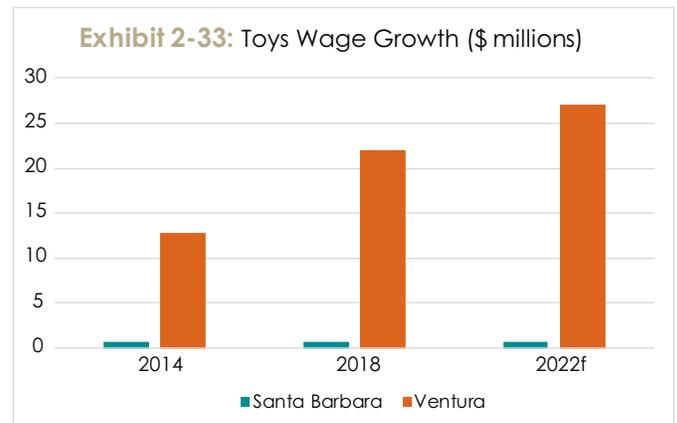
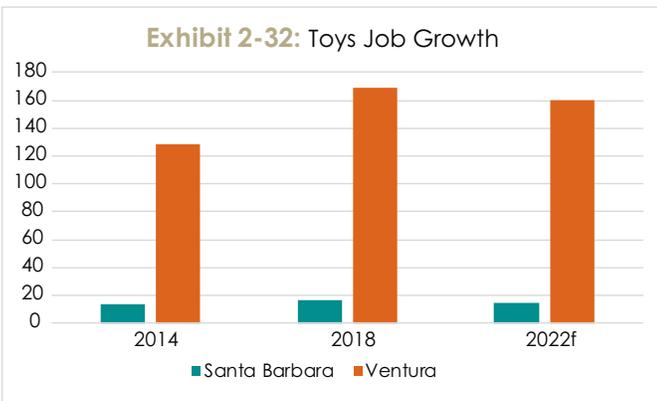


Exhibit 2-34: Economic Impact of the Toys Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	4	7	11
Jobs	16	169	185
Labor Income (\$ millions)	\$0.70	\$22.00	\$22.70
Nonemployer Establishments, 2017	13	23	36
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$11.90	\$79.90	\$91.80
Total Jobs	54	399	453
Total Labor Income (\$ millions)	\$3.70	\$26.80	\$30.50
Total Taxes, State & Local (\$ millions)	\$0.60	\$5.90	\$6.50

VISUAL AND PERFORMING ARTS PROVIDERS



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 Instruments Manufacturing

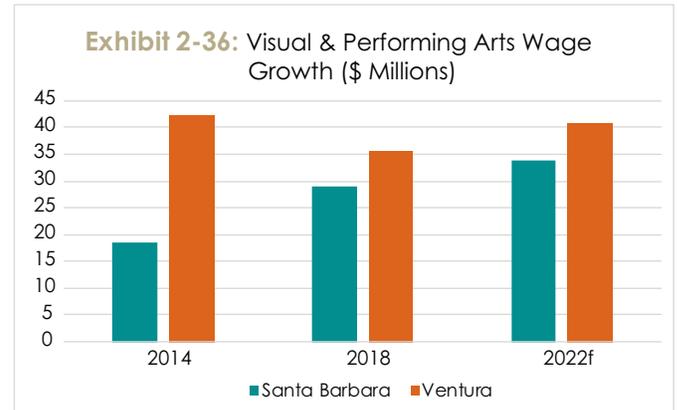
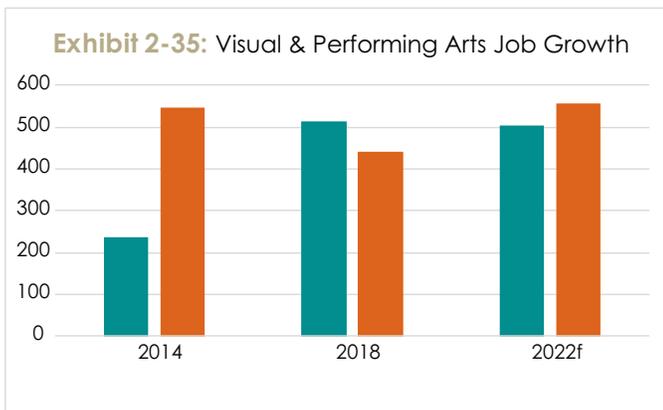


Exhibit 2-37: Economic Impact of the Visual & Performing Arts Industry, 2018

Direct Activity	Santa Barbara	Ventura	Total
Establishments	99	217	316
Jobs	514	440	954
Labor Income (\$ millions)	\$28.91	\$35.56	\$64.47
Nonemployer Establishments, 2017	1887	3501	5,388
Total Effects (Direct, Indirect, Induced)			
Output (\$ millions)	\$211.50	\$268.10	\$479.60
Total Jobs	3,060	4,925	7,985
Total Labor Income (\$ millions)	\$106.00	\$115.50	\$221.60
Total Taxes, State & Local (\$ millions)	\$11.20	\$15.50	\$26.60

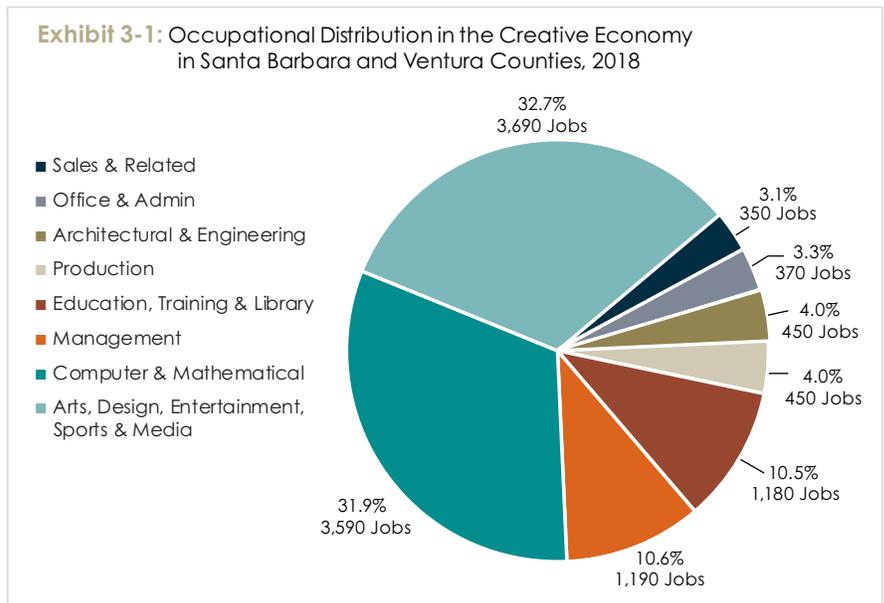
III. OCCUPATIONS IN THE CREATIVE ECONOMY

Employment in the creative economy involves either those who work in a creative industry or those who work in creative occupations. Creative occupations produce and distribute cultural, consumer, and commercial goods and services. This section examines the creative occupations component of the creative economy. 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 gathers 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, 491 were included in the data set for this report, and of those, 38 have been identified as creative. These 38 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 and jewelers. 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 2018, there were 5,170 workers in Santa Barbara County employed in a creative occupation and 6,100 in Ventura County. This represents 2.8 percent of total occupation-based employment in Santa Barbara County and 1.9 percent in Ventura County. Both counties trail the statewide average for share of creative occupations, at 3.5 percent of all occupational employment, suggesting there is opportunity for growth in the region's creative occupations and economy.

In both counties, the largest share of individuals employed in creative occupations worked in arts, design, entertainment, sports and media: 39 percent in Ventura County and 25 percent in Santa Barbara County for a total of 3,690 workers. Across both counties, 3,590 people worked in computer and mathematical occupations, as software developers for applications and systems software. The next largest group of creative workers in the region were employed in management occupations (1,190).



Santa Barbara and Ventura Counties do not represent particularly large shares of California's creative economy. The office and administrative creative jobs in the two counties represent 4.3 percent of the state's total employment. Creative occupations in education, training and library in the two counties account for 3.2 percent of the state employment. While neighboring Los Angeles County may dominate the state's share of creative occupations, Santa Barbara and Ventura benefit from their proximity to L.A.'s creative hub, providing significant opportunities to designers, writers and creative business positions.

That numerous creative occupations may be found across so many industries suggest the importance of creativity throughout the economy as a highly valued attribute essential to the success of many 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 MULTIMEDIA WORKERS EARN?

It is now widely established that 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 Ventura and Santa Barbara region bear this out.

Benefitting from an 11 year expansion prior to the coronavirus pandemic, continued job creation eliminated slack in the labor market, captured statistically as the unemployment rate. As unemployment falls and the supply of labor diminishes, continued demand for labor puts upward pressure on wages as firms compete for workers. Some industries, however, have been subject to greater automation than others, causing some forms of low-to-moderate forms of work to be eliminated. Certain industries, therefore, have demonstrated wage loss despite wage increases in aggregate and in other industries where human labor is still in high demand.

The occupations listed on exhibits 3-4, 3-5, 3-6, and 3-7 were selected because they align closely with the creative industries defined in this report. Between 2017 and 2018, there was a great deal of variation in median annual wage growth. The median wage across all occupations in Santa Barbara and Ventura Counties in 2018 was \$54,890 and \$54,400, respectively. The overall median wage for creative occupations in Santa Barbara and Ventura County in 2018 was \$52,680 and \$49,470, respectively. Of the 25 occupations for which wage data was available in Santa Barbara County, 13 had

Exhibit 3-2: Changes in Wages from 2017 to 2018, Ventura County

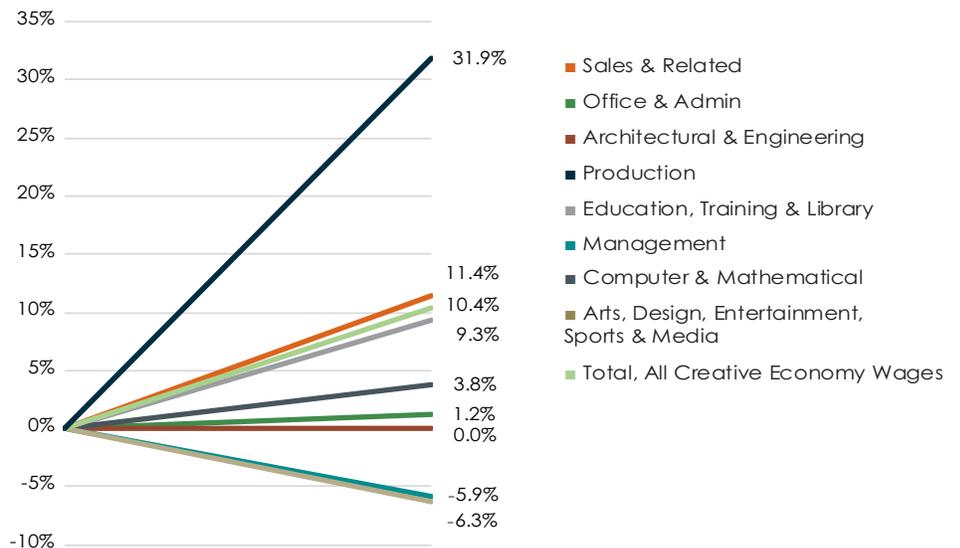
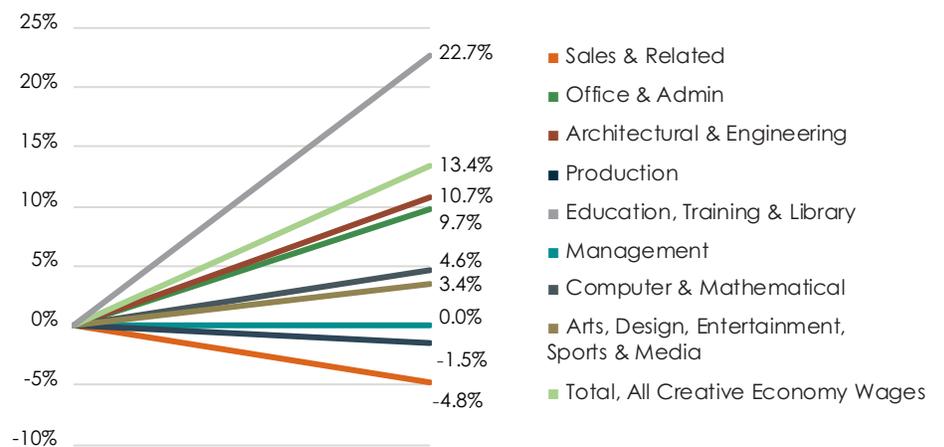


Exhibit 3-3: Changes in Wages from 2017 to 2018, Santa Barbara County



incomes above the county median. Of the 30 occupations in Ventura County for which wage data was available, 14 had annual incomes above the county median. In Ventura and Santa Barbara, in 2018, the creative occupation receiving the highest annual median wage was marketing managers, earning \$155,630 and \$136,310 respectively.

The exhibits 3-6 and 3-7 show employment and median wage changes for selected creative occupations in 2018 compared with 2017.

There are many reasons why some of these occupations may have suffered a decline in wages. Many of these professions are increasingly dominated by independent contractors, who often work on a project by project basis which adds up to an overall lower wage. Some of these occupations may also be concentrated in declining industries, such as some subsets of the retail trade industry, or are in the process of facing increased automation, especially for routine processes. Declining wages can also be attributable to industry-specific economic trends such as a lack of new home building, decreasing demand for architects and interior designers. Finally, many individuals employed in creative occupations may be working part-time, which would cause a decline in median annual wage.

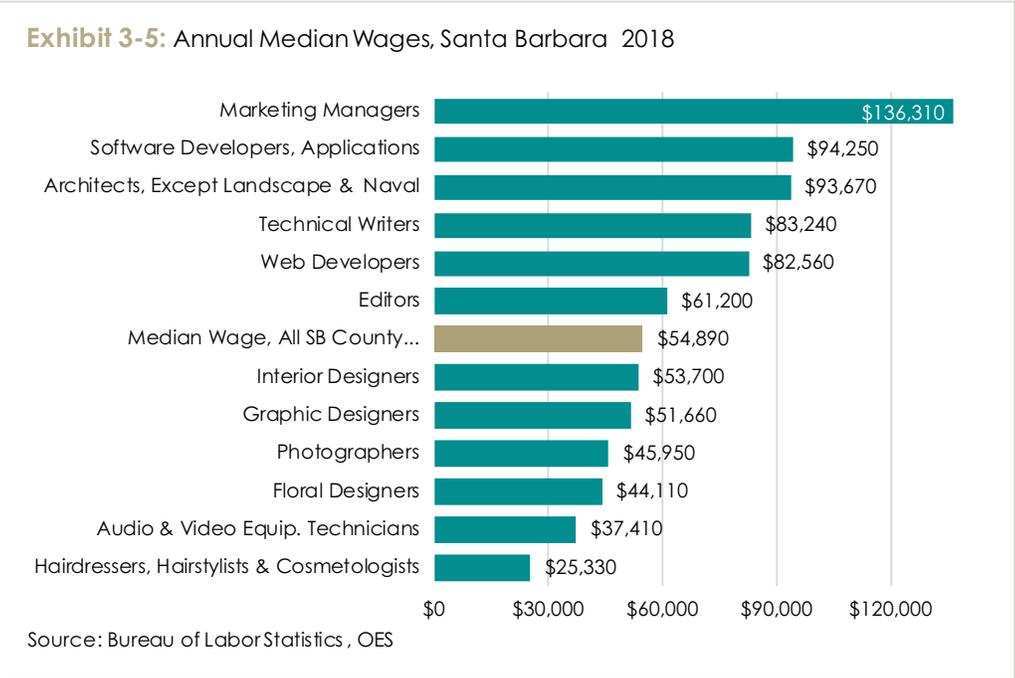
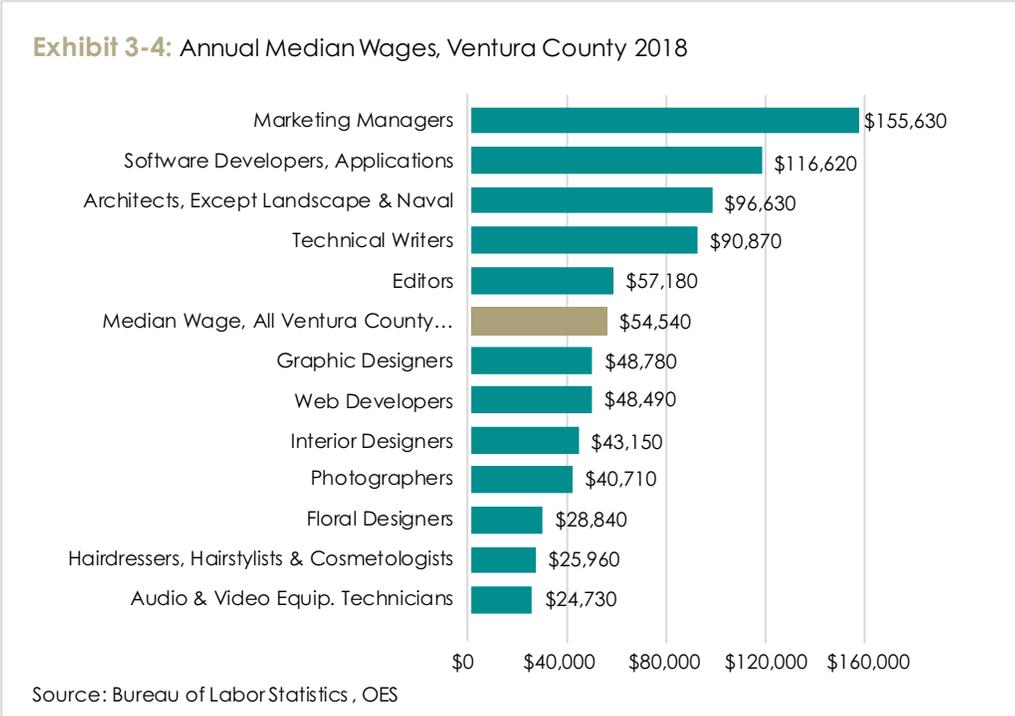


Exhibit 3-6: Santa Barbara County Employment & Earnings for Selected Creative Economy Occupations, 2017 and 2018

Occupation	Employment			Annual Median Wage		
	2017	2018	% Change	2017	2018	% Change
Editors	160	140	-20%	\$65,970	\$61,200	-7.20%
Web Developers	190	140	-50%	\$81,530	\$82,560	1.30%
Technical Writers	80	70	-10%	\$76,390	\$83,240	9.00%
Architects, Except Landscape & Naval	100	100	0%	\$83,690	\$93,670	11.90%
Software Developers, Applications	830	810	-20%	\$97,450	\$94,250	-3.30%
Marketing Managers	280	310	30%	\$143,050	\$136,310	-4.70%
Hairdressers, Hairstylists & Cosmetologists	220	250	30%	\$25,080	\$25,330	1.00%
Audio & Video Equip. Technicians	**	**		\$35,440	\$37,410	5.60%
Floral Designers	40	50	10%	\$43,540	\$44,110	1.30%
Photographers	**	50		**	\$45,950	
Graphic Designers	190	210	20%	\$41,120	\$51,660	25.60%
Interior Designers	90	70	-20%	\$50,100	\$53,700	7.20%

Exhibit 3-7: Ventura County Employment & Earnings for Selected Creative Economy Occupations, 2017 and 2018

Occupation	Employment			Annual Median Wage		
	2017	2018	% Change	2017	2018	% Change
Editors	180	160	-20%	\$71,720	\$57,180	-20.30%
Web Developers	380	320	-60%	\$57,610	\$48,490	-15.80%
Technical Writers	130	150	20%	\$88,200	\$90,870	3.00%
Architects, Except Landscape & Naval	**	90		\$100,620	\$96,630	-4.00%
Software Developers, Applications	880	930	50%	\$106,560	\$116,620	9.40%
Marketing Managers	540	560	20%	\$165,350	\$155,630	-5.90%
Hairdressers, Hairstylists & Cosmetologists	360	550	190%	\$25,730	\$25,960	0.90%
Audio & Video Equip. Technicians	**	**		\$24,820	\$24,730	-0.40%
Floral Designers	70	110	40%	\$31,320	\$28,840	-7.90%
Photographers	150	90	-60%	\$35,280	\$40,710	15.40%
Graphic Designers	400	340	-60%	\$49,310	\$48,780	-1.10%
Interior Designers	**	**		\$40,190	\$43,150	7.40%

IV. NONPROFIT SECTOR OF THE CREATIVE ECONOMY

The nonprofit sector plays an indispensable role in American society and the economy. The nonprofit sector is a source of jobs. 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 consumer 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 billions of hours of their time and expertise.

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 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.

This section describes the nonprofit sector in California and in the counties of Santa Barbara and Ventura using data from the Internal Revenue Service (IRS) Statements of Income (SOI) program. While these data show a rich and deep ecosystem of arts-related nonprofits in the state and 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 California and Santa Barbara and Ventura Counties.

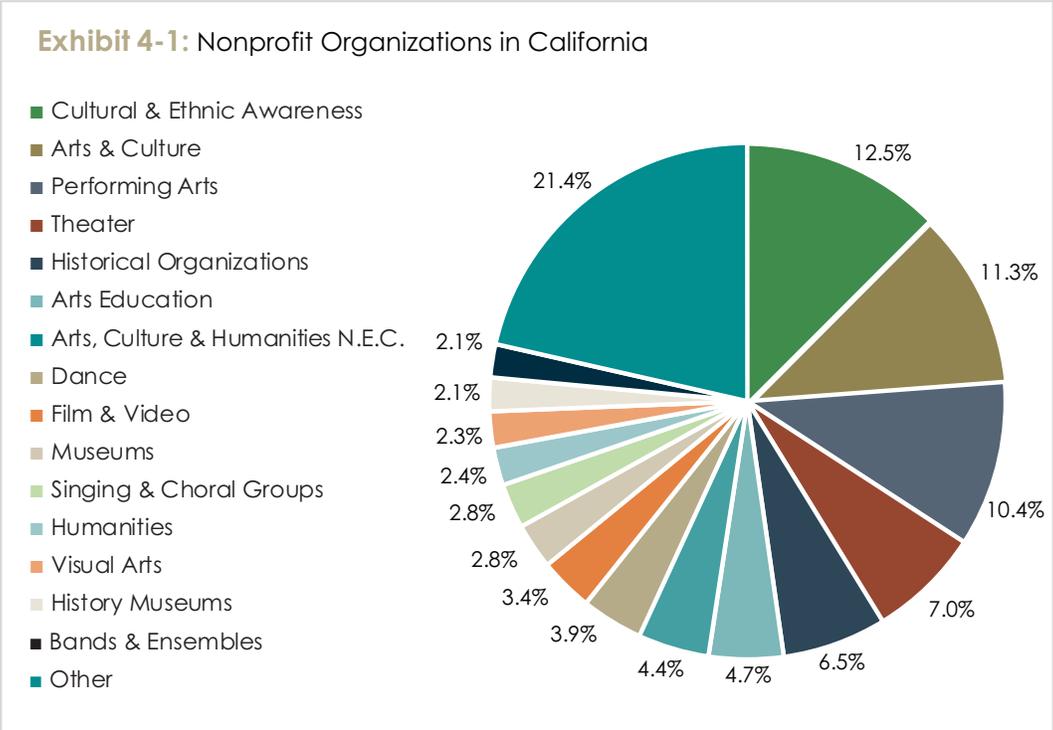


Exhibit 4-2: Arts Related Nonprofits & Regional Shares, 2018

	California	Santa Barbara County	Santa Barbara County Share	Ventura County	Ventura County Share
Number of Organizations	11,622	213	1.80%	301	2.60%
Reported Assets (\$ millions)	\$18,811.50	\$550.31	2.90%	\$83.04	0.40%
Reported Income (\$ millions)	\$10,251.15	\$181.06	1.80%	\$75.15	0.70%
Reported Revenue (\$ millions)	\$4,933.52	\$99.51	2.00%	\$64.90	1.30%

Exhibit 4-3: Breakdown of Arts Nonprofit Organizations in Santa Barbara County

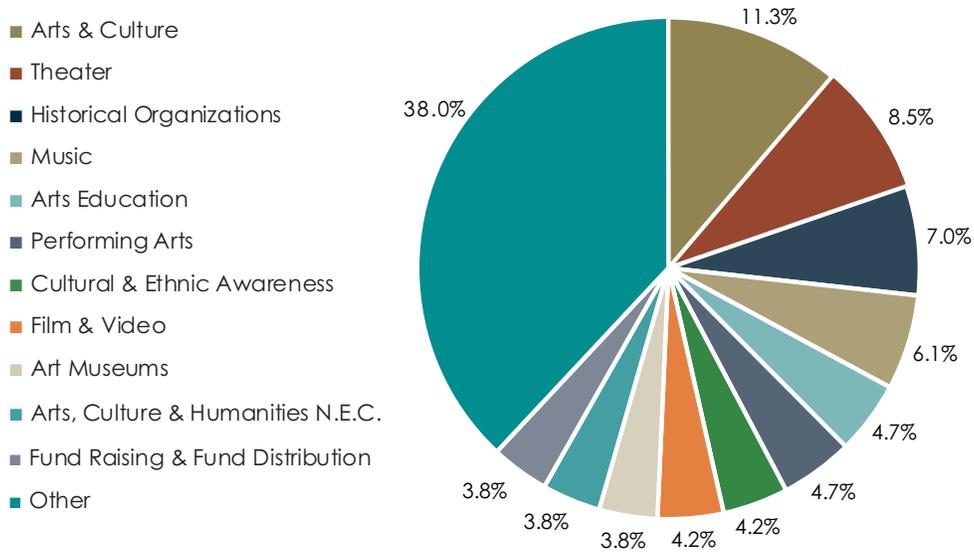
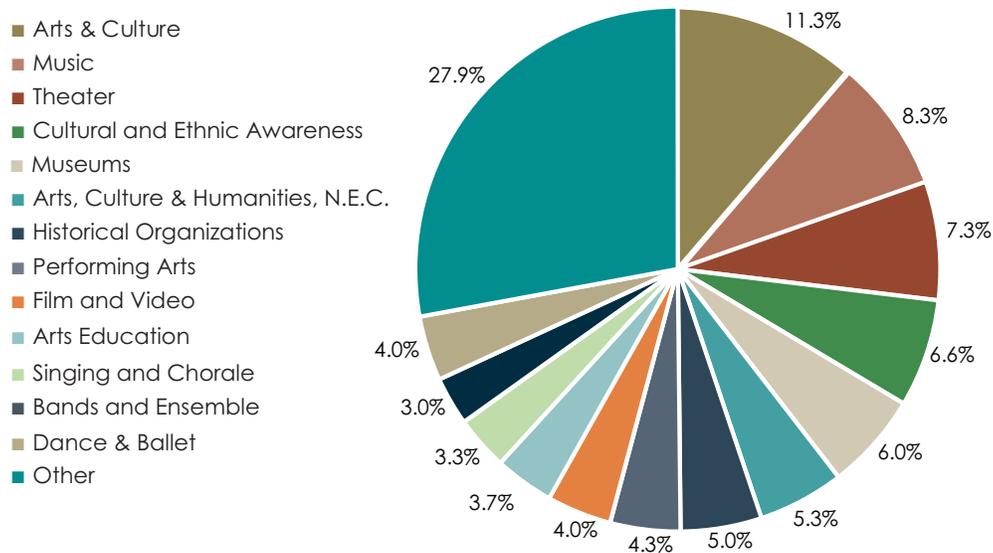


Exhibit 4-4: Breakdown of Arts Nonprofit Organizations in Ventura County



V. ARTS EDUCATION

Education in the arts is a necessary part of preparing students to meet the demands of the twenty-first 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. 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. These skills are often cited as those employers are looking for.

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 from year-to-year and the number of classes that meet University of California or California State University (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. Also, course enrollment totals may 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).

K-12 creative course enrollment by sex can be found in the Appendix.

In Santa Barbara County, 24 percent of all courses taught are considered creative, as compared to 23 percent of all kindergarten to 12th grade courses offered across California; this figure is 23 percent in Ventura County. For both counties, this figure has been relatively constant from the 2014-15 school year to the 2018-19 school year, the latest school year for which data is available.

In Ventura County, 49 percent of all creative courses meet UC/CSU entrance requirements, which compares favorably to the only 33 percent of K-12 courses offered overall in the county's public schools. For Santa Barbara County, these figures are 45 percent and 30 percent, respectively. Statewide, 49 percent of creative courses meet public university entrance requirements compared to only 33 percent of public-school courses generally. In both counties, creative courses have increasingly met UC/CSU entrance requirements. Indeed, from the 2014-15 school year to the 2018-19 school year the number of creative courses meeting public university entrance requirements rose 12 percent in Santa Barbara County and 10 percent in Ventura County. In both counties, creative course enrollment has remained stable across the five school years covered in this report.



Exhibit 5-1: Santa Barbara County K-12 Creative Courses Meeting UC/CSU Requirements

Course Subject Area	Academic Year									
	2018-2019		2017-2018		2016-2017		2015-2016		2014-2015	
	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts
Art	359	170	334	189	324	193	315	186	420	181
Arts, Media, & Entertainment	163	124	122	95	62	35	72	33	48	20
Dance	9	1	10	2	9	3	10	3	9	1
Drama/Theater	49	25	49	23	60	35	50	21	95	20
Engineering & Architecture	35	15	37	15	24	9	25	11	17	4
English Language Arts	2,337	997	2,260	803	2,272	799	2,113	773	2,361	768
Fashion & Interior Design	47	27	32	0	20	0	15	0	13	0
Information & Communication Technologies	55	27	58	36	91	34	92	15	64	5
Marketing, Sales, & Service	12	7	13	6	31	15	25	4	66	0
Music	181	60	172	66	165	79	145	76	232	72
Creative Course Totals	3,247	1,453	3,087	1,235	3,058	1,202	2,862	1,122	3,325	1,071
All Courses Totals	13,480	4,075	12,527	3,596	11,726	3,425	10,747	3,015	13,311	3,705

Exhibit 5-2: Ventura County K-12 Creative Courses Meeting UC/CSU Requirements

Course Subject Area	Academic Year									
	2018-2019		2017-2018		2016-2017		2015-2016		2014-2015	
	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts	No. of Classes	Courses Meeting UC/CSU Reqmts
Art	659	456	733	473	666	411	548	296	518	290
Arts, Media, & Entertainment	383	289	394	294	311	184	301	131	270	120
Dance	54	25	57	24	52	21	48	23	49	22
Drama/Theater	84	27	55	18	57	28	83	44	81	35
Engineering & Architecture	65	44	61	40	49	18	51	19	30	7
English Language Arts	4,175	1,858	4,346	1,871	4,245	1,787	4,002	1,649	3,711	1,469
Fashion & Interior Design	29	15	13	0	13	0	38	0	34	0
Information & Communication Technologies	89	66	95	47	243	51	195	11	91	7
Marketing, Sales, & Service	50	38	27	22	78	54	73	5	24	4
Music	421	128	427	94	405	87	403	97	372	74
Creative Course Totals	6,009	2,946	6,208	2,883	6,119	2,641	5,742	2,275	5,180	2,028
All Courses Totals	26,096	8,595	26,673	8,174	25,897	7,637	24,977	7,227	23,231	6,429

VI. HOW TO USE THIS REPORT

This study documents in detail that the creative economies of Santa Barbara and Ventura Counties are already significant contributors to the South Central Coast region's competitiveness. Moreover, there is opportunity for the cluster's growth in jobs and economic impact, a particularly important consideration given the diminution of other industry clusters over time due to various economic phenomena, especially automation and company relocation.

The profile of the Santa Barbara and Ventura Counties' creative economies contained in this document

Understanding the size and contribution of the creative industries to the region's economy and how it has changed over time is essential to enabling greater regional coordination of resources and services to support those industries.

communicates a clear profile of the creative industries of the region, thereby defining their economic impact and reflecting their diversity from an economic benefit and human capital perspective.

This report is intended to be a tool to enable economic developers and policymakers to:

- Develop concentrated outreach and engagement to the region's creative economy cluster which would add value to, complement and leverage Economic Development Collaborative's (EDC) existing focus on business technical assistance and entrepreneurship, especially in the context of the EDC's role as the Ventura County Film Commission;
- Build capacity in the EDC's Ventura and Santa Barbara County Small Business Development Center, enhancing expertise for delivering technical assistance to strengthen businesses within the cluster and targeting firms in the region's creative economy;
- Enhance services for facilitating entrepreneurial development in the Creative Economy (incubating and scaling firms, strengthening self-employment conditions and opportunity, technical support, market development for artists, etc.);
- Implement strategies for attracting and retaining creative talent in the region;
- Develop marketing and branding to promote creative assets both to businesses and as cultural tourism in both counties;
- Create a support and networking structure that includes convening leadership and building collaborative connections across industries in Santa Barbara and Ventura Counties; and
- Enable the launch of a Ventura County creative economy initiative as directed under the Ventura County Economic Vitality Strategic Plan (EVSP) to align with the principles of the plan, strengthen the creative industries highlighted in the EVSP, elevate the creative economy's profile, and facilitate entrepreneurship in the creative economy.

APPENDIX

NOTES ON METHODOLOGY AND DATA

Since first being commissioned in 2007 by Otis College of Art and Design to study the creative economy, the LAEDC has continued to analyze and evaluate the contribution of the creative economy to the state of California and its various regions. This report, commissioned by the Economic Development Collaborative is the first to examine the creative economies of Santa Barbara and Ventura Counties.

This report defines the creative economy as being composed by 12 separate creative sectors, each of which embodies the production of creative goods and services in distinct and economically valuable ways. The creative sectors or industries in this report encompass the following twelve categories:

- Architecture/Interior Design
- Entertainment
- Art Galleries
- Fashion
- Publishing & Printing
- Toys
- Communication Arts
- Furniture/Decorative Arts
- Visual & Performing Arts Providers
- Digital Media
- Industrial Design Services
- Fine & Performing Arts Schools

In order to capture the full impact of these creative industries to the counties of Santa Barbara and Ventura, 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 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 counties of Ventura and Santa Barbara.

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.

Given the granularity of the industry definitions used in the characterization of the creative economy, some data points were subject to non-disclosure by state and federal data sources. Where necessary, estimates for these non-disclosed data were applied to the IMPLAN model to gain the fullest accounting of creative employment, establishments and wages.

DETAILED TABLES

Exhibit A-1: Number Of Creative Nonemployer Firms In Santa Barbara County, 2017

CREATIVE INDUSTRY	NAICS Code	2012	2013	2014	2015	2016	2017	5-Year Receipts Change	2012-2017 Avg. Annual Growth %
Architecture & Interior Design		300	314	317	332	304	312	12	0.80%
Architectural Services	54131	166	172	169	176	172	174	8	1.00%
Drafting Services	54134	52	51	69	67	55	59	7	2.70%
Landscape Design	54132	82	91	79	89	77	79	-3	-0.70%
Art Galleries	45392	50	0	46	46	52	48	-2	-0.80%
Communication Arts		1,056	1,067	1,163	1,194	1,170	1,167	111	2.10%
Specialized Design Services	5414	487	502	532	557	536	531	44	1.80%
Advertising Agencies	5418	230	229	264	255	256	275	45	3.90%
Photographic Services	54192	339	336	367	382	378	361	22	1.30%
Entertainment		209	203	234	241	242	262	53	5.10%
Motion Picture/Video Production	5121	144	142	165	171	172	195	51	7.10%
Sound Recording	5122	43	40	49	51	50	48	5	2.30%
Broadcasting (except Internet)	515	22	21	20	19	20	19	-3	-2.70%
Fashion	82126	147	153	159	163	169	160	13	1.80%
Textile Mills Manufacturing	313	0	4	0	3	4	5	5	
Apparel Manufacturing	315	50	49	46	52	51	55	5	2.00%
Apparel Wholesaling	4243	43	45	47	47	43	40	-3	-1.40%
Footwear Manufacturing	3162	0	0	0	0	0	0	0	
Other Leather & Allied Prods Mfg	31699	13	13	15	15	14	12	-1	-1.50%
Jewelry Wholesaling	42394	41	42	51	46	57	48	7	3.40%
Furniture & Decorative Arts		62	56	63	74	68	76	14	4.50%
Textile Product Mills	314	6	4	7	6	4	4	-2	-6.70%
Furniture Manufacturing	337	30	27	30	40	40	43	13	8.70%
Furniture Wholesaling	4232	16	17	17	20	14	19	3	3.80%
Glass & Glass Product Mfg	32721	10	8	9	8	10	10	0	0.00%
Other Nonmetallic Mineral Product Mfg	3279	0	0	0	0	0	0	0	
Publishing and Printing		227	247	236	253	218	213	-14	-1.20%
Printing & Related Support Activities	3231	40	39	35	43	38	32	-8	-4.00%
Block, Periodical, Newspaper Wholesalers	42492	25	23	20	18	19	22	-3	-2.40%
Publishing Industries (except Internet)	511	162	185	181	192	161	159	-3	-0.40%
Toys		13	14	13	10	14	13	0	0.00%
Toy Wholesaling	42392	13	14	13	10	14	13	0	0.00%
Visual & Performing Arts Providers		1,596	1,667	1,688	1,816	1,780	1,887	291	3.60%
Performing Arts Companies	7111	85	107	118	105	105	99	14	3.30%
Agents and Managers of Artists, etc.	71141	46	35	36	46	47	47	1	0.40%
Independent Artists, Writers, etc.	71151	1,450	1,516	1,534	1,653	1,618	1,731	281	3.90%
Museums	7121	15	9	0	12	10	10	-5	-6.70%
TOTAL		3,660	3,721	3,919	4,129	4,017	4,138	478	2.60%

Exhibit A-2: Value of Receipts (\$ Thousands) of Creative Firms in Santa Barbara County, 2017

CREATIVE INDUSTRY	NAICS Code	2012	2013	2014	2015	2016	2017	5-Year Receipts Change	2012-2017 Avg. Annual Growth %
Architecture & Interior Design		15,307	16,279	16,336	18,903	18,909	18,879	3,572	4.70%
Architectural Services	54131	11,195	11,273	11,319	12,800	13,731	13,232	2,037	3.60%
Drafting Services	54134	1,358	1,398	1,946	2,202	1,972	2,154	796	11.70%
Landscape Design	54132	2,754	3,608	3,071	3,901	3,206	3,493	739	5.40%
Art Galleries	45392	2,192	0	2,873	2,214	2,096	2,243	51	0.50%
Communication Arts		40,673	43,721	51,142	52,411	48,055	45,547	4,874	2.40%
Specialized Design Services	5414	20,364	21,122	23,831	27,415	24,073	23,024	2,660	2.60%
Advertising Agencies	5418	11,405	13,209	16,451	14,568	12,847	13,507	2,102	3.70%
Photographic Services	54192	8,904	9,390	10,860	10,428	11,135	9,016	112	0.30%
Entertainment		9,183	8,298	9,152	10,105	10810	10,498	1,315	2.90%
Motion Picture/Video Production	5121	5,908	5,963	6,285	7,501	7,492	8,474	2,566	8.70%
Sound Recording	5122	1,259	1,312	1,550	1,474	1,577	1,178	-81	-1.30%
Broadcasting (except Internet)	515	2,016	1,023	1,317	1,130	1,741	846	-1,170	-11.60%
Fashion	82126	9,324	10,977	9,613	8,122	9380	9,509	185	0.40%
Textile Mills Manufacturing	313	0	91	0	65	74	120	120	
Apparel Manufacturing	315	2,732	3,648	2,854	2,573	2,903	3,293	561	4.10%
Apparel Wholesaling	4243	2,686	3,943	2,661	1,860	2,377	3,418	732	5.50%
Footwear Manufacturing	3162	0	0	0	0	0	0	0	
Other Leather & Allied Prods Mfg	31699	388	291	382	489	569	342	-46	-2.40%
Jewelry Wholesaling	42394	3,518	3,004	3,716	3,135	3,457	2,336	-1,182	-6.70%
Furniture & Decorative Arts		3,475	3,100	3,229	4,762	4,636	5,880	2,405	13.80%
Textile Product Mills	314	75	118	94	469	169	135	60	16.00%
Furniture Manufacturing	337	1,709	1,433	1,934	2,125	2,550	2,474	765	9.00%
Furniture Wholesaling	4232	1,582	1,386	1,014	2,023	1,731	3,146	1,564	19.80%
Glass & Glass Product Mfg	32721	109	163	187	145	186	125	16	2.90%
Other Nonmetallic Mineral Product Mfg	3279	0	0	0	0	0	0	0	
Publishing and Printing		9,295	9,450	9,959	10,805	8,429	8,803	-492	-1.10%
Printing & Related Support Activities	3231	1,629	1,738	1,566	2,015	996	909	-720	-8.80%
Block, Periodical, Newspaper Wholesalers	42492	1,153	901	905	821	855	748	-405	-7.00%
Publishing Industries (except Internet)	511	6,513	6,811	7,488	7,969	6,578	7,146	633	1.90%
Toys		824	902	662	500	605	1,104	280	6.80%
Toy Wholesaling	42392	824	902	662	500	605	1,104	280	6.80%
Visual & Performing Arts Providers		39,234	41,211	45,721	45,967	48,442	49,510	10,276	5.20%
Performing Arts Companies	7111	2,649	2,650	3,345	2,899	1,916	2,406	-243	-1.80%
Agents and Managers of Artists, etc.	71141	1,117	1,110	1,328	1,825	1,966	2,254	1,137	20.40%
Independent Artists, Writers, etc.	71151	35,188	37,216	41,048	40,945	44,110	44,554	9,366	5.30%
Museums	7121	280	235	0	298	450	296	16	1.10%
TOTAL		129,507	133,938	148,687	153,789	151,362	151,973	22,466	3.50%

Exhibit A-3: Number of Creative Nonemployer Firms in Ventura County, 2017

CREATIVE INDUSTRY	NAICS Code	2012	2013	2014	2015	2016	2017	5-Year Receipts Change	2012-2017 Avg. Annual Growth %
Architecture & Interior Design		347	365	361	382	361	366	19	1.10%
Architectural Services	54131	170	164	162	162	155	169	-1	-0.10%
Drafting Services	54134	79	91	89	99	92	78	-1	-0.30%
Landscape Design	54132	98	110	110	121	114	119	21	4.30%
Art Galleries	45392	45	53	61	65	59	55	10	4.40%
Communication Arts		1,818	1,882	1,889	1,994	2,009	2,037	219	2.40%
Specialized Design Services	5414	808	839	839	883	899	869	61	1.50%
Advertising Agencies	5418	515	524	527	551	529	576	61	2.40%
Photographic Services	54192	495	519	523	560	581	592	97	3.90%
Entertainment		730	752	756	753	834	889	159	4.40%
Motion Picture/Video Production	5121	556	562	576	548	638	674	118	4.20%
Sound Recording	5122	130	136	136	155	151	165	35	5.40%
Broadcasting (except Internet)	515	44	54	44	50	45	50	6	2.70%
Fashion	82126	238	255	268	290	268	248	10	0.80%
Textile Mills Manufacturing	313	0	0	0	7	9	4	4	
Apparel Manufacturing	315	77	85	88	91	83	77	0	0.00%
Apparel Wholesaling	4243	92	92	96	105	103	93	1	0.20%
Footwear Manufacturing	3162	0	0	0	0	0	0	0	
Other Leather & Allied Prods Mfg	31699	9	6	8	9	8	8	-1	-2.20%
Jewelry Wholesaling	42394	60	72	76	78	65	66	6	2.00%
Furniture & Decorative Arts		81	89	87	86	95	89	8	2.00%
Textile Product Mills	314	10	11	14	9	8	6	-4	-8.00%
Furniture Manufacturing	337	36	41	40	40	44	45	9	5.00%
Furniture Wholesaling	4232	26	27	24	27	34	32	6	4.60%
Glass & Glass Product Mfg	32721	9	10	9	6	4	6	-3	-6.70%
Other Nonmetallic Mineral Product Mfg	3279	0	0	4	5	0	0		
Publishing & Printing		393	356	375	348	330	330	-63	-3.20%
Printing & Related Support Activities	3231	108	92	96	84	84	78	-30	-5.60%
Block, Periodical, Newspaper Wholesalers	42492	33	27	30	27	27	29	-4	-2.40%
Publishing Industries (except Internet)	511	252	237	249	237	219	223	-29	-2.30%
Toys		22	28	0	24	26	23	1	0.90%
Toy Wholesaling	42392	22	28	0	24	26	23	1	0.90%
Visual and Performing Arts Providers		3,017	3,082	3,247	3,320	3,446	3,501	484	3.20%
Performing Arts Companies	7111	191	211	263	272	279	245	54	5.70%
Agents & Managers of Artists, etc.	71141	163	164	168	185	190	182	19	2.30%
Independent Artists, Writers, etc.	71151	2,654	2,697	2,809	2,853	2,964	3,058	404	3.00%
Museums	7121	9	10	7	10	13	16	7	15.60%
TOTAL		6,691	6,862	7,044	7,262	7,428	7,538	847	2.50%

Exhibit A-4: Value of Receipts (\$ Thousands) of Creative Firms in Ventura County, 2017

CREATIVE INDUSTRY	NAICS Code	2012	2013	2014	2015	2016	2017	5-Year Receipts Change	2012-2017 Avg. Annual Growth %
Architecture & Interior Design		15,497	15,704	17,310	19,493	18,030	17,893	2396	3.10%
Architectural Services	54131	9,613	9,197	10,587	11,055	9,973	10,367	754	1.60%
Drafting Services	54134	2,200	2,328	2,254	2,850	2,827	2,715	515	4.70%
Landscape Design	54132	3,684	4,179	4,469	5,588	5,230	4,811	1127	6.10%
Art Galleries	45392	3,147	2,498	3,253	1,804	1,769	3,620	473	3.00%
Communication Arts		64,767	71,219	74,719	79,737	84,166	90,660	25,893	8.00%
Specialized Design Services	5414	25,120	27,997	27,223	30,266	33,290	33,559	8,439	6.70%
Advertising Agencies	5418	27,786	30,428	32,937	33,370	35,030	38,341	10,555	7.60%
Photographic Services	54192	11,861	12,794	14,559	16,101	15,846	18,760	6,899	11.60%
Entertainment		30,187	30,947	32,063	33,803	35,849	34,405	4,218	2.80%
Motion Picture/Video Production	5121	23,694	23,806	24,579	26,464	28,233	26,297	2,603	2.20%
Sound Recording	5122	4,803	5,661	5,766	5,244	5,479	5,624	821	3.40%
Broadcasting (except Internet)	515	1,690	1,480	1,718	2,095	2,137	2,484	794	9.40%
Fashion	82126	11,411	14,799	13,303	16,600	17,020	13,565	2154	3.80%
Textile Mills Manufacturing	313	0	0	0	283	165	316	316	
Apparel Manufacturing	315	2,847	2,994	3,262	3,849	2,861	3,952	1105	7.80%
Apparel Wholesaling	4243	5,393	6,336	6,166	8,125	9,339	5,705	312	1.20%
Footwear Manufacturing	3162	0	0	0	0	0	0	0	
Other Leather & Allied Prods Mfg	31699	245	193	197	274	177	204	-41	-3.30%
Jewelry Wholesaling	42394	2,926	5,276	3,678	4,069	4,478	3,388	462	3.20%
Furniture & Decorative Arts		4,511	3,825	4,914	3,872	5,222	5,715	1,204	5.30%
Textile Product Mills	314	229	153	273	181	141	476	247	21.60%
Furniture Manufacturing	337	1,518	2,084	1,917	1,406	1,578	1,933	415	5.50%
Furniture Wholesaling	4232	2,288	967	2,613	2,058	3,359	3,158	870	7.60%
Glass & Glass Product Mfg	32721	476	621	111	176	67	148	-328	-13.80%
Other Nonmetallic Mineral Product Mfg	3279	0	0	0	51	77	0	0	
Publishing & Printing		19,696	16,556	18,116	17,306	16,954	20,932	1,236	1.30%
Printing & Related Support Activities	3231	6,997	6,563	7,073	5,605	5,647	6,126	-871	-2.50%
Block, Periodical, Newspaper Wholesalers	42492	1,747	942	1,532	954	1,036	643	-1104	-12.60%
Publishing Industries (except Internet)	511	10,952	9,051	9,511	10,747	10,271	14,163	3211	5.90%
Toys		1,690	2,118	0	3,010	2,659	1,901	211	2.50%
Toy Wholesaling	42392	1,690	2,118	0	3,010	2,659	1,901	211	2.50%
Visual and Performing Arts Providers		83,100	89,563	90,737	93,108	101,517	102,863	19,763	4.80%
Performing Arts Companies	7111	6,269	5,708	6,229	8,702	11,110	7,651	1,382	4.40%
Agents & Managers of Artists, etc.	71141	12,393	11,889	12,057	11,670	12,628	12,356	-37	-0.10%
Independent Artists, Writers, etc.	71151	64,304	71,774	72,332	72,545	77,629	82,527	18,223	5.70%
Museums	7121	134	192	119	191	150	329	195	29.10%
TOTAL		234,006	247,229	254,415	268,733	283,186	291,554	57548	4.90%

Exhibit A-5: Santa Barbara and Ventura Counties' Shares of California Employment by Creative Occupation, 2017

	Soc Code	Occupational Title	California	Santa Barbara County	Ventura County	SB/Ventura Share of CA
Management Occupation	11-2011	Advertising & Promotions Managers	3,400		60	1.80%
	11-2021	Marketing Managers	33,380	280	540	2.50%
	11-2031	Public Relations & Fundraising Managers	7,620	110	130	3.10%
Computer & Mathematical	15-1132	Software Developers, Applications	141,870	830	880	1.20%
	15-1133	Software Developers, Systems Software	82,630	1220	720	2.30%
Architectural & Engineering	17-1011	Architects, except L & scape & Naval	13,880	100		0.70%
	17-1012	L & scape Architects	2,470		90	3.60%
	17-3011	Architectural & Civil Drafters	14,840	80	130	1.40%
Education, Training & Library	25-1121	Art, Drama, & Music Teachers, Postsecondary	11,010	260		2.40%
	25-1123	English Language & Literature Teachers, Postsecondary	6,790			0.00%
	25-4013	Museum Technicians & Conservators	1,790	40		2.20%
	25-4021	Librarians	8,940	80	170	2.80%
	25-4031	Library Technicians	10,390	280	300	5.60%
Arts, Design, Entertainment, Sports, & Media	27-1011	Art Directors	6,920	40	80	1.70%
	27-1021	Commercial & Industrial Designers	3,610		70	1.90%
	27-1022	Fashion Designers	6,540		60	0.90%
	27-1023	Floral Designers	3,750	40	70	2.90%
	27-1024	Graphic Designers	30,180	190	400	2.00%
	27-1025	Interior Designers	8,130	90		1.10%
	27-1026	Merchandise Displayers & Window Trimmers	14,570	130	280	2.80%
	27-1027	Set & Exhibit Designers	3,370		40	1.20%
	27-2011	Actors	13,000		70	0.50%
	27-2012	Producers & Directors	29,100		160	0.50%
	27-2042	Musicians & Singers	6,770	100	30	1.90%
	27-3011	Radio & Television Announcers	2,880		70	2.40%
	27-3031	Public Relations Specialists	26,890	190	600	2.90%
	27-3041	Editors	10,940	160	180	3.10%
	27-3042	Technical Writers	6,340	80	130	3.30%
	27-3043	Writers & Authors	7,990		40	0.50%
	27-4011	Audio & Video Equipment Technicians	15,930			0.00%
	27-4012	Broadcast Technicians	4,620			0.00%
	27-4021	Photographers	5,810		150	2.60%
Sales & Related	41-3011	Advertising Sales Agents	17,290	210	170	2.20%
Office & Admin	43-4121	Library Assistants, Clerical	9,400	160	220	4.00%
Production Occupations	51-6052	Tailors, Dressmakers, & Custom Sewers	2,470		40	1.60%
	51-7011	Cabinetmakers & Bench Carpenters	10,650	90	290	3.60%
	51-9071	Jewelers, Precious Stone & Metal Workers	2,940			0.00%
	51-9123	Painting, Coating, & Decorating Workers	1,650			0.00%
Total			590,750	4760	6170	1.90%

Exhibit A-6: Santa Barbara and Ventura Counties' Shares of California Employment by Creative Occupation, 2018

	Soc Code	Occupational Title	California	Santa Barbara County	Ventura County	SB/Ventura Share of CA
Management Occupation	11-2011	Advertising & Promotions Managers	2,850		70	2.50%
	11-2021	Marketing Managers	37,410	310	560	2.30%
	11-2031	Public Relations & Fundraising Managers	8,330	90	160	3.00%
Computer & Mathematical	15-1132	Software Developers, Applications	148,550	810	930	1.20%
	15-1133	Software Developers, Systems Software	88,910	1,250	600	2.10%
Architectural & Engineering	17-1011	Architects, except Landscape & Naval	88,910	100	90	0.20%
	17-1012	Landscape Architects	237,460			
	17-3011	Architectural & Civil Drafters	13,570	70	190	1.90%
Education, Training & Library	25-1121	Art, Drama, & Music Teachers, Postsecondary	9,710	240		2.50%
	25-1123	English Language & Literature Teachers, Postsecondary	6,470	190		2.90%
	25-4013	Museum Technicians & Conservators	1,890	50		2.60%
	25-4021	Librarians	8,560	70	140	2.50%
	25-4031	Library Technicians	10,180	200	290	4.80%
Arts, Design, Entertainment, Sports, & Media	27-1011	Art Directors	7,620	40	90	1.70%
	27-1021	Commercial & Industrial Designers	4,090		70	1.70%
	27-1022	Fashion Designers	6,480	130		2.00%
	27-1023	Floral Designers	4,510	50	110	3.50%
	27-1024	Graphic Designers	29,320	210	340	1.90%
	27-1025	Interior Designers	8,460	70		0.80%
	27-1026	Merchandise Displayers & Window Trimmers	16,780	130	230	2.10%
	27-1027	Set & Exhibit Designers	2,650		30	1.10%
	27-2011	Actors	14,230		110	0.80%
	27-2012	Producers & Directors	25,320	90	130	0.90%
	27-2042	Musicians & Singers	6,100	80	50	2.10%
	27-3011	Radio & Television Announcers	2,780		70	2.50%
	27-3031	Public Relations Specialists	26,820	190	650	3.10%
	27-3041	Editors	11,060	140	160	2.70%
	27-3042	Technical Writers	6,240	70	150	3.50%
	27-3043	Writers & Authors	7,910		60	0.80%
	27-4011	Audio & Video Equipment Technicians	14,290			0.00%
	27-4012	Broadcast Technicians	4,450	40	60	2.20%
	27-4021	Photographers	6,060	50	90	2.30%
	Sales & Related	41-3011	Advertising Sales Agents	16,380	210	140
Office & Admin	43-4121	Library Assistants, Clerical	8,570	190	180	4.30%
Production Occupations	51-6052	Tailors, Dressmakers, & Custom Sewers	2,860			0.00%
	51-7011	Cabinetmakers & Bench Carpenters	10,690	100	250	3.30%
	51-9071	Jewelers, Precious Stone & Metal Workers	3,520		100	2.80%
	51-9123	Painting, Coating, & Decorating Workers	1,630			0.00%
Total			601,100	5,170	6,100	1.90%

Exhibit A-7: Santa Barbara County Arts-Related Nonprofit Organizations

NTEE Code	Description	Number of Organizations	Asset Total (\$ thousands)	Income Totals (\$ thousands)	Revenue Total (\$ thousands)
A03	Professional Societies & Associations	4	\$34.10	\$86.80	\$86.80
A11	Single Organization Support	2	\$3,665.50	\$867.40	\$342.90
A12	Fund Raising & Fund Distribution	8	\$360.90	\$816.90	\$784.00
A20	Arts & Culture	24	\$9,122.30	\$4,030.10	\$3,835.20
A23	Cultural & Ethnic Awareness	9	\$4,846.40	\$10,740.60	\$10,697.10
A25	Arts Education	10	\$204.80	\$375.80	\$375.80 21
A26	Arts & Humanities Councils & Agencies	1	\$278.90	\$13.60	\$13.60
A27	Community Celebrations	1	\$2,961.90	\$1,807.70	\$1,807.70
A30	Media & Communications	1	\$26.20	\$19.10	\$19.10
A31	Film & Video	9	\$7,318.10	\$5,584.00	\$5,568.60
A32	Television	2	\$518.60	\$631.50	\$619.90
A33	Printing & Publishing	5	\$111.60	\$159.90	\$153.90
A40	Visual Arts	7	\$2,664.40	\$636.50	\$200.10
A50	Museums	7	\$8,023.50	\$1,419.00	\$712.00
A51	Art Museums	8	\$122,692.10	\$42,081.00	\$16,207.10
A54	History Museums	6	\$5,996.70	\$2,214.70	\$2,072.10
A56	Natural History & Natural Science Museums	2	\$72,955.60	\$36,725.00	\$7,848.00
A57	Science & Technology Museums	1	-	-	-
A60	Performing Arts	10	\$1,195.80	\$846.30	\$828.00
A61	Performing Arts Centers	5	\$139,296.30	\$19,855.80	\$11,807.90
A62	Dance	7	\$325.00	\$1,689.30	\$484.20
A63	Ballet	2	\$967.50	\$1,629.40	\$1,574.60
A65	Theater	18	\$19,329.20	\$4,924.90	\$2,959.00
A68	Music	13	\$2,008.50	\$1,449.10	\$1,371.00
A69	Symphony Orchestras	4	\$7,542.40	\$4,741.90	\$3,669.00
A6B	Singing & Choral Groups	4	-	-	-
A6C	Bands & Ensembles	3	\$40.00	\$27.40	\$25.20
A6E	Performing Arts Schools	3	\$102,557.60	\$23,017.30	\$16,873.40
A70	Humanities	6	\$17.00	\$65.20	\$65.20
A80	Historical Organizations	15	\$11,676.20	\$6,850.60	\$2,623.40
A82	Historical Societies & Historic Preservation	5	\$15,836.50	\$3,273.80	\$1,953.00
A84	Commemorative Events	3	\$1,676.20	\$1,744.30	\$1,410.20
A99	Arts, Culture & Humanities N.E.C.	8	\$6,055.80	\$2,733.80	\$2,520.80
Totals		213	\$550,305.80	\$181,058.70	\$99,508.10

Exhibit A8: Ventura County Arts-Related Nonprofit Organizations

NTEE Code	Description	Number of Organizations	Asset Total (\$ thousands)	Income Total (\$ thousands)	Revenue Total (\$ thousands)
A01	Alliances & Advocacy	3	-	-	-
A51	Art Museums	8	\$6,567.80	\$3,527.70	\$871.80
A20	Arts & Culture	34	\$6,282.20	\$4,732.00	\$4,549.80
A26	Arts & Humanities	3	\$447.20	\$1,314.20	\$1,314.20
A25	Arts Education	11	\$159.90	\$657.20	\$626.60
A90	Arts Services	5	\$3,535.80	\$37.70	\$37.70
A99	Arts, Culture & Humanities N.E.C.	16	\$1,637.20	\$2,528.60	\$2,508.40
A63	Ballet	4	\$152.70	\$306.80	\$301.60
A6C	Bands & Ensemble	9	\$53.00	\$215.40	\$89.10
A52	Children's Museum	1	\$91.90	\$275.30	\$275.30
A84	Commemorative Events	1	-	-	-
A23	Cultural & Ethnic Awareness	20	\$11,172.20	\$11,061.50	\$10,992.50
A62	Dance	8	\$127.40	\$190.60	\$190.20
A31	Film & Video	12	\$1,103.70	\$1,245.40	\$1,245.40
A12	Fund Raising & Fund Distribution	4	\$241.30	\$702.30	\$671.70
A80	Historical Organizations	15	\$805.40	\$1,543.60	\$1,476.80
A82	Historical Societies & Historic Preservation	5	\$1,872.60	\$509.10	\$383.90
A54	History Museums	3	\$1,459.60	\$353.00	\$219.20
A70	Humanities	4	\$7.00	\$57.00	\$57.00
A30	Media & Communications	5	\$844.40	\$1,482.50	\$1,459.10
A50	Museums	18	\$19,476.30	\$8,219.10	\$6,746.60
A68	Music	25	\$4,743.60	\$6,497.10	\$6,181.50
A6A	Opera	2	\$22.70	\$51.20	\$51.20
A60	Performing Arts	13	\$290.40	\$2,664.20	\$2,649.90
A61	Performing Arts Centers	8	\$12,838.60	\$11,096.90	\$6,964.90
A6E	Performing Arts Schools	2	-	-	-
A33	Printing & Publishing	2	\$704.00	\$263.30	\$524.80
A34	Radio	4	\$595.90	\$5,856.50	\$5,856.50
A57	Science & Technology Museums	2	\$731.00	\$1,098.60	\$168.50
A6B	Singing & Choral Groups	10	\$263.90	\$338.50	\$318.80
A11	Single Organization Support	7	\$228.90	\$401.70	\$390.10
A19	Support N.E.C.	1	-	-	-
A69	Symphony Orchestras	7	\$314.50	\$387.00	\$372.20
A32	Television	3	\$1,924.30	\$471.60	\$471.60
A65	Theater	22	\$2,545.00	\$4,716.70	\$4,634.30
A40	Visual Arts	4	\$1,800.50	\$2,350.30	\$2,300.50
Totals		301	\$83,040.80	\$75,152.60	\$64,901.60

Exhibit A-9: Santa Barbara County K-12 Creative Course Enrollment by Sex

Course Subject Area	Academic Year														
	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	Female	Male	Total Course												
Art	3,225	2,811	6,036	2,994	2,670	5,664	3,010	2,590	5,600	2,659	2,362	5,021	2,941	2,589	5,530
Arts, Media, & Entertainment	558	734	1,292	637	790	1,427	500	728	1,228	1,221	1,414	2,635	1,457	1,511	2,968
Dance	272	19	291	254	29	283	230	17	247	284	30	314	285	16	301
Drama/Theater	753	472	1,225	671	452	1,123	777	506	1,283	622	365	987	613	399	1,012
Engineering & Architecture	203	410	613	252	485	737	280	450	730	333	560	893	288	501	789
English Language Arts	22,413	23,934	46,347	21,636	22,700	44,336	22,119	23,424	45,543	21,153	22,243	43,396	20,965	22,165	43,130
Fashion & Interior Design	235	54	289	178	62	240	194	59	253	217	48	265	232	73	305
Information & Communication Technologies	437	798	1,235	434	985	1,419	595	1,078	1,673	209	707	916	167	666	833
Marketing, Sales, & Service	224	327	551	214	322	536	219	332	551	114	167	281	105	113	218
Music	1,795	1,763	3,558	1,849	1,655	3,504	1,877	1,777	3,654	1,768	1,719	3,487	2,244	2,188	4,432
Creative Course Totals	30,115	31,322	61,437	29,119	30,150	59,269	29,801	30,961	60,762	28,580	29,615	58,195	29,297	30,221	59,518
All Courses Totals	113,208	118,801	232,009	111,176	115,818	226,994	113,181	117,649	230,830	118,997	123,346	242,343	120,647	125,226	245,873

Exhibit A-10: Ventura County K-12 Creative Course Enrollment by Sex

Course Subject Area	Academic Year														
	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	Female	Male	Total Course												
Art	5,316	5,179	10,495	5,509	5,057	10,566	6,125	5,290	11,415	5,766	5,145	10,911	5,972	4,947	10,919
Arts, Media, & Entertainment	2,295	2,485	4,780	2,379	2,651	5,030	3,039	3,602	6,641	4,443	3,899	8,342	3,763	3,754	7,517
Dance	965	83	1,048	962	49	1,011	1,004	61	1,065	1,196	102	1,298	1,162	89	1,251
Drama/Theater	1,071	839	1,910	1,122	905	2,027	802	535	1,337	601	374	975	810	427	1,237
Engineering & Architecture	130	394	524	312	832	1,144	295	826	1,121	422	1,128	1,550	249	877	1,126
English Language Arts	38,427	40,547	78,974	39,484	40,865	80,349	39,020	40,454	79,474	38,868	40,686	79,554	38,529	40,032	78,561
Fashion & Interior Design	167	31	198	127	24	151	58	11	69	36	10	46	77	10	87
Information & Communication Technologies	288	683	971	537	1,084	1,621	943	1,858	2,801	509	1,397	1,906	660	1,310	1,970
Marketing, Sales, & Service	134	155	289	136	154	290	883	934	1,817	217	307	524	342	517	859
Music	6,003	5,035	11,038	5,925	5,027	10,952	6,159	5,166	11,325	5,988	5,195	11,183	5,779	5,090	10,869
Creative Course Totals	54,796	55,431	110,227	56,493	56,648	113,141	58,328	58,737	117,065	58,046	58,243	116,289	57,343	57,053	114,396
All Courses Totals	248,837	259,364	508,201	255,435	262,933	518,368	260,016	266,667	526,683	260,661	267,543	528,204	258,572	266,043	524,615



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