



2025 Southern California Economic Update

Dec. 4, 2025

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Welcome Remarks



Eric Garcetti

42nd Mayor of the City of Los Angeles

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2025 Southern California Economic Update Report



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Today's Presenters from SCAG's Economic Roundtable



OVERVIEW & VENTURA COUNTY
Mark Schniepp, Ph.D.

Director, California Economic Forecast



IMPERIAL COUNTY
Michael Bracken

Managing Partner & Chief Economist,
Development Management Group, Inc.



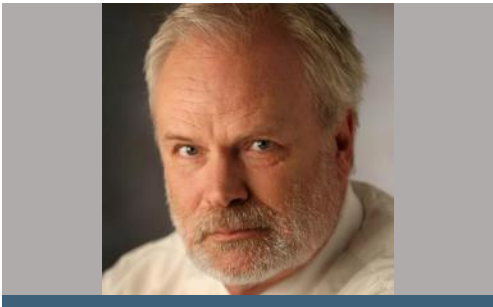
LOS ANGELES COUNTY
Shannon Sedgwick

Senior Director of the Institute for Applied
Economics, Los Angeles County Economic
Development Corporation



ORANGE COUNTY
Wallace Walrod, Ph.D.

Founder and Managing Partner,
Tech Coast Consulting Group



RIVERSIDE COUNTY
Manfred Keil, Ph.D.

Chief Economist, Inland Empire Economic
Partnership and Claremont McKenna College



SAN BERNARDINO COUNTY
Robert Kleinhenz, Ph.D.

Principal Economist, Kleinhenz
Economics



ECONOMIC OPPORTUNITY
Beth Tamayose, Ph.D.

Research Director, University of California,
Riverside School of Public Policy



SUSTAINABILITY
David Roland-Holst, Ph.D.

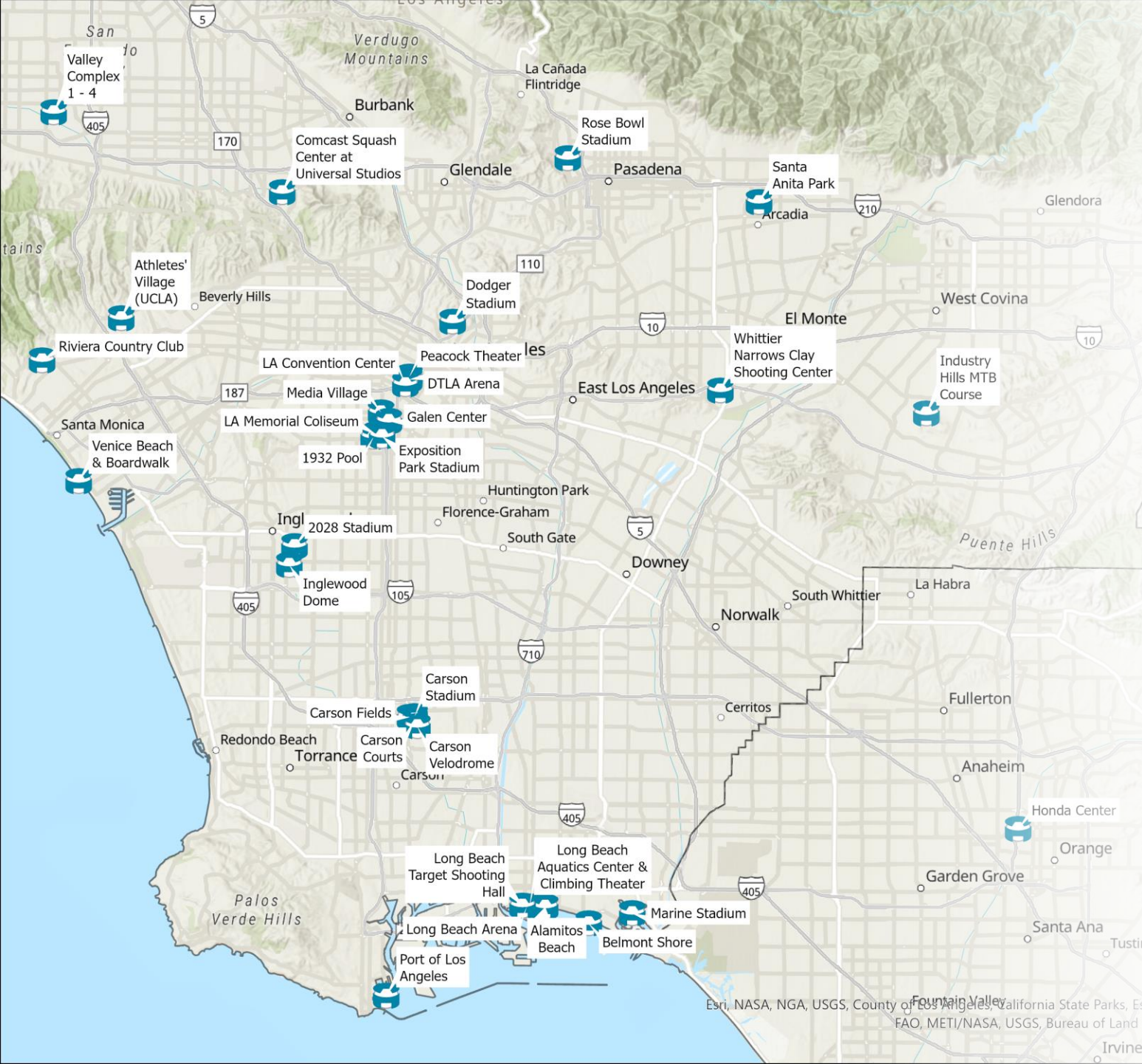
Managing Director, Berkeley Economic
Advising & Research



Analysis of the Economic Impacts of the LA28 Games on Southern California

Wallace Walrod, Ph.D.

Founder and Managing Partner, Tech Coast Consulting Group



The “No Build” Advantage

- By utilizing the region's existing world-class facilities, LA28 avoids the single largest expense that has plagued past host cities.
- **37 of 41** listed venues are in Los Angeles County
- LA28 budget share of event operations, engineering, management, performing arts, etc., is comparatively higher.
- SCAG region's mature tourism economy to support visitor spending.
- LA28 Committee's \$160 million investment in youth sports in the City of Los Angeles (PlayLA.)

A Transportation Focus and Legacy

- Transportation serving spectators and residents is outside the purview of LA28.
- The Games Mobility Executives (GME) have prioritized, fast-tracked, and upscaled major transportation projects in the region.
- Local jurisdictions and partners also funding permanent mobility projects with a Games nexus.

Overall approach modeled after 1984 Olympics financial surplus and LA84 Foundation.



Los Angeles County has many transportation expansion projects underway.



An example of mobility strategies at the 2024 Paris Games.

How We Modeled the Economic Impacts

Intended to capture economic output over 2024-29 in the region’s six counties, but this time period means that “legacy effects” are generally not captured.

LA28 Committee Spending	Visitor Spending Estimate	Transportation Infrastructure Investments
<p>Balanced operating budget of \$7.15 billion funded by private revenue and IOC funds:</p> <ul style="list-style-type: none">- Performing arts, spectator sports, and related industries (29 percent)- Event management, logistics, and security (27 percent)- Professional, scientific, and technical services (22 percent)- Construction (20 percent)	<p>New money injected from athletes, tourists, media, sponsors, etc.</p> <p>Primarily spent on lodging, food, and retail.</p> <p>35 percent by residents, 65 percent by nonresidents.</p> <p>Between \$1.89 and \$2.37 billion.</p> <p>Update of Beacon (2017) range currently used by LA28 committee.</p>	<p>1) LA Metro’s Twenty-Eight by ‘28 plan accelerates key transit and connectivity projects. Conservative estimate sourced from SCAG FTIP (\$4.25 billion).</p> <p>2) List of known, permanent mobility projects with a Games nexus from additional local jurisdictions’ programs (\$380 million).</p> <p>(1+ 2) → Range of \$1.25 to \$4.64 billion attributed to Games.</p>

Economic Impacts Methodology

- We used REMI TranSight 5.3.
- Dynamic input-output model of an economy.
- Also used for Connect SoCal 2028 and FTIP.
- Three kinds of economic impacts:
 1. Direct Effects
 2. Indirect Effects
 3. Induced Effects



SCAG Region Headline Economic Output (Regional GDP)

LA28 Games Estimated GDP Impact in the SCAG Region, 2024-2029

LOW SCENARIO

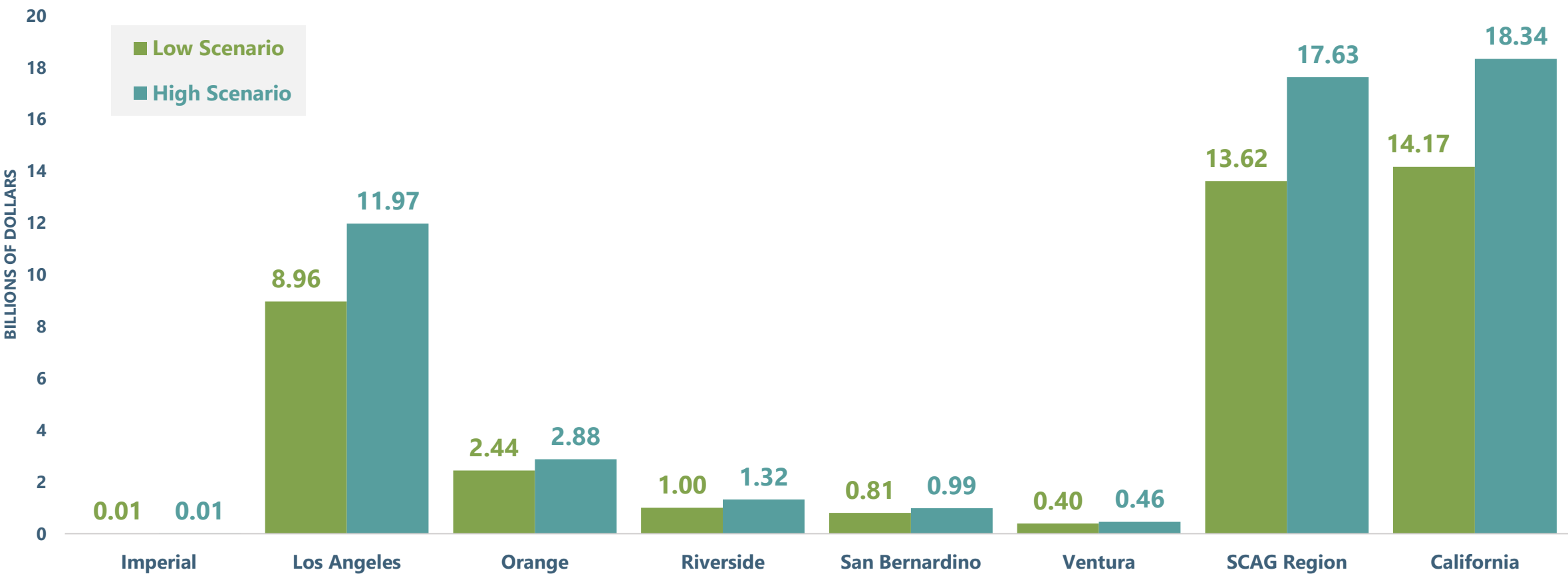
\$13.6
BILLION

HIGH SCENARIO

\$17.6
BILLION

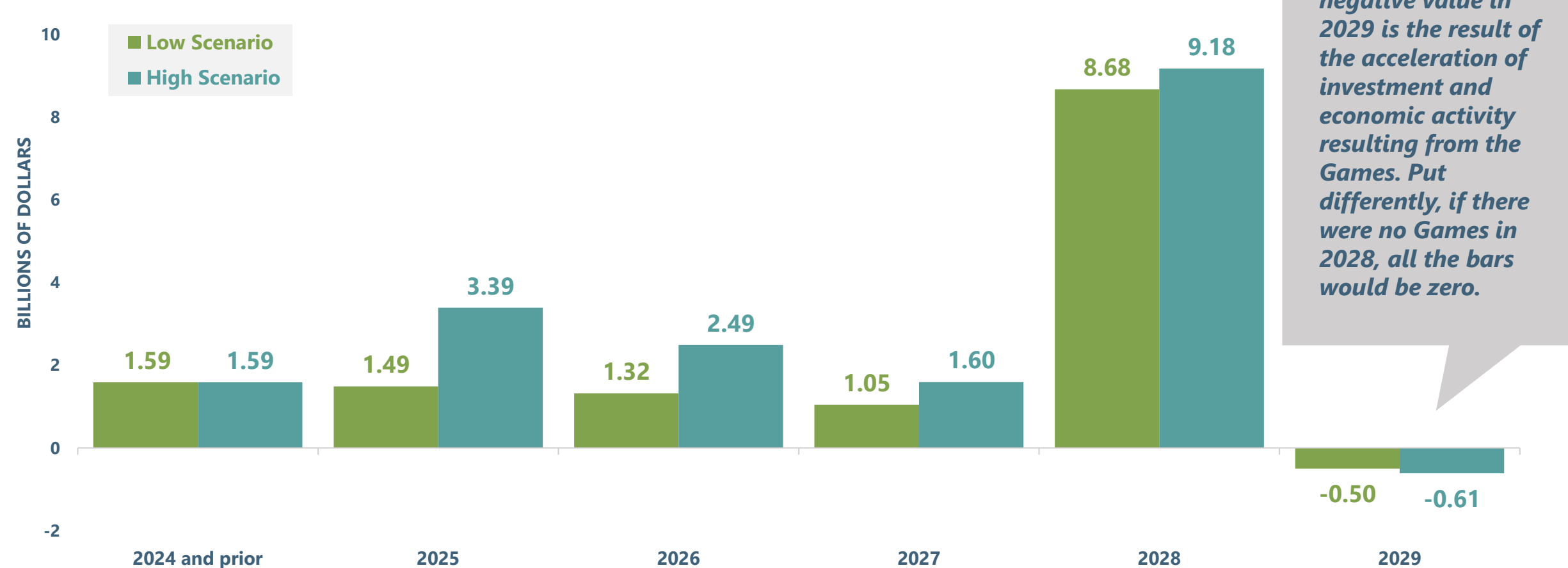
GDP Impacts by County

LA28 Games GDP Impact by County, 2024-29



GDP Impacts by Year

LA28 Games GDP Impact in the SCAG Region by Year



Job Creation

Top Industries, SCAG Region, 2024-29	Low	High
Administrative and support services	21,022	22,240
Construction	20,947	36,304
Performing arts, spectator sports, and related industries	13,421	13,615
Professional, scientific, and technical services	11,987	13,406
Food services and drinking places	6,702	8,410
State and local government	5,989	7,859

Between
116,000 and 149,000
annual jobs
from 2024-29

Between
74,000 and 78,000
jobs in 2028

Takeaways of Analysis

- **Comparatively low construction costs and risk to taxpayers.** Of the LA28 Committee's privately funded \$7.149 billion total budget, only \$1.428 billion is allocated to venue construction.
- **Significant regional economic activity.** The region's already high concentration of firms that contribute professional, administrative, and sports/recreation services means that a high share of labor and materials can be sourced locally.
- **Economic benefits spread across Southern California.** While 37 of 41 venues are in Los Angeles County, 33 percent of the expected economic impact is in the region's other five counties.
- **Additional legacy impacts for years after the Games.** The LA28 Committee allocated \$160 million of its budget for youth sports development in the City of Los Angeles. The 2028 deadline has focused public attention on completing a wide range of transportation infrastructure projects that can support the games but will benefit the region for decades into the future.

While future economic outcomes are difficult to predict, much of the LA28 Games planning is structured to replicate the financial successes of the 1984 Los Angeles Olympics.

Community, Youth, and Transportation Legacy

The 1984 Legacy: Proof

The 1984 Games generated a \$232.5 million surplus, endowing the **LA84 Foundation**.

For over 40 years, it has operated as a non-profit for youth sports.

Invested over \$250 million in 2,000+ community programs.

Served over three million children in Southern California.

The 2028 Legacy: Promise

LA28 is building on this model with a \$160 million investment in "**PlayLA**."

Funded by the LA28 committee to increase access to youth sports.

Began in 2018, putting community and youth development at the forefront a full decade *before* the Games begin.

Focuses on providing subsidized access for underserved communities.

Transportation Legacy

At the heart of the region's infrastructure improvement effort is LA Metro's **Twenty-Eight by '28 Initiative**. These projects will be essential for moving millions of visitors during the Games. Importantly, they will also provide a lasting legacy of improved mobility for the residents of Los Angeles and surrounding counties, helping to reduce traffic congestion, improve air quality, and create a more connected, sustainable region for generations to come.



SCAG Region

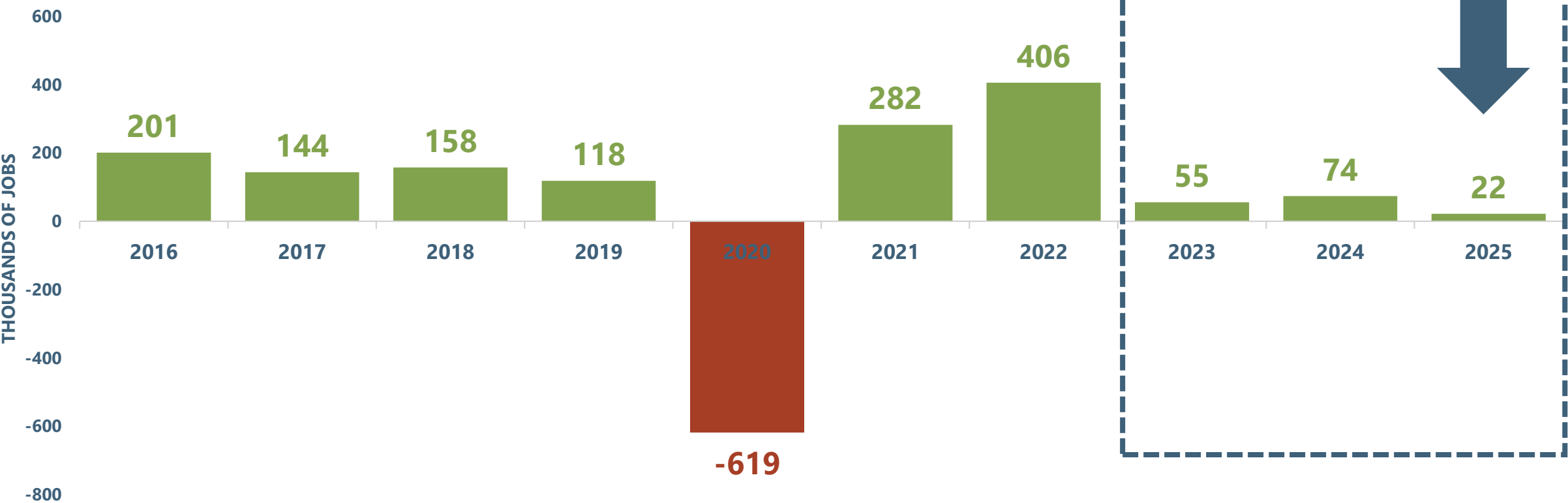
Mark Schniepp, Ph.D.
Director, California Economic Forecast

SCAG Region Economic Summary for 2025

- Job formation in the labor markets is weak, with the exception of healthcare and the public sector.
- Rising unemployment rate largely limited to 16-to-24-year age group.
- The widespread adoption of AI systems has impacted entry level jobs in the professional services, technology, film/TV, financial, and manufacturing sectors.
- New residential development has also softened, despite legislation passed in Sacramento designed to augment new housing.
- Visitor serving sector relatively stable despite fewer international tourists.
- The newly enacted tariff policies this year have not materially impacted cargo volumes at Ports of Los Angeles and Long Beach.

SCAG Region on Track to Generate Few Jobs in 2025 Representing Lowest Annual Number Since 2011

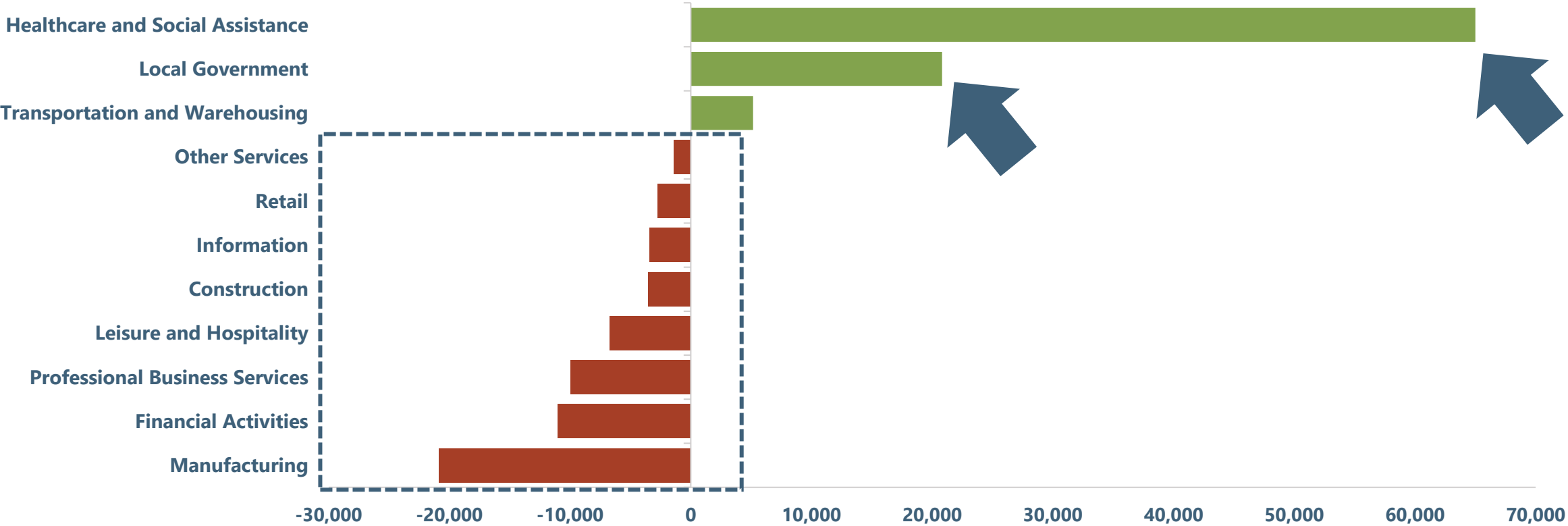
Annual Job Creation in SCAG Region



Source: California Employment Development Department. Data for 2025 is annualized based on year-to-date performance relative to the same period in 2024.

SCAG Region Job Creation Limited to Healthcare and the Public Sector

Jobs Created in 2025 by Sector, SCAG Region

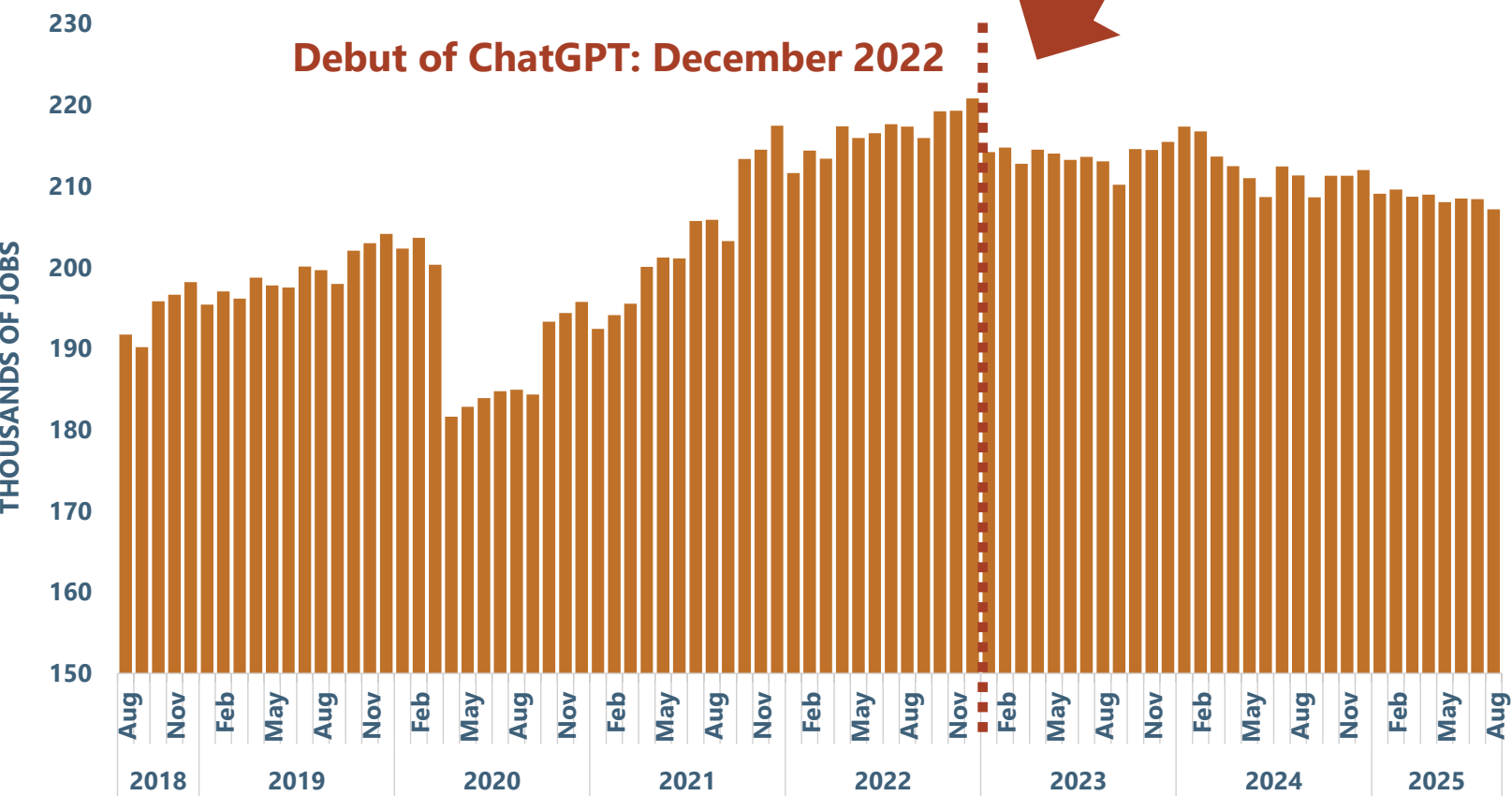


Source: California Employment Development Department. Data for 2025 is annualized based on year-to-date performance relative to the same period in 2024.

The Erosion of High-Tech Employment Coincides with the Advent of ChatGPT

- Software Development and Publishing
- Data Processing and Internet Hosting
- Computer and Components Design
- Scientific, Technical Consulting
- Semi-conductor Development and Design

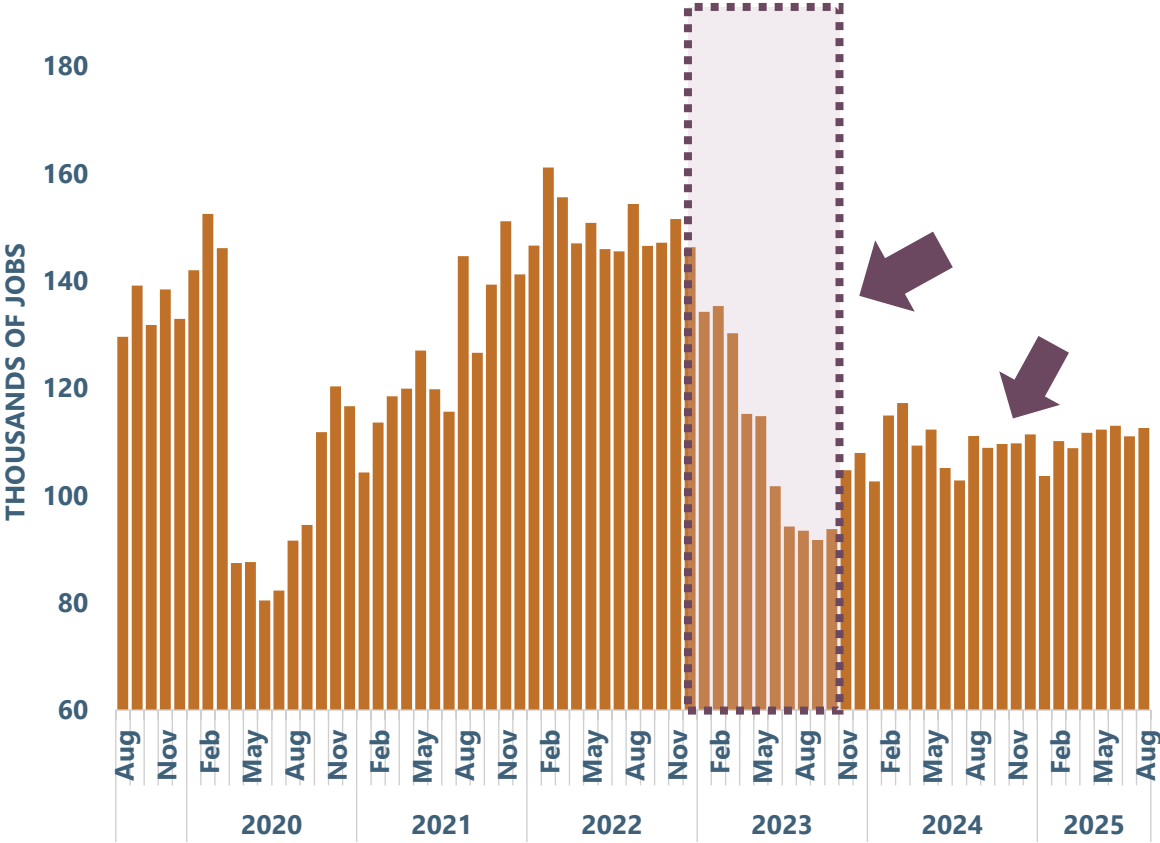
Employment in High Tech Services, SCAG Region



Source: California Employment Development Department

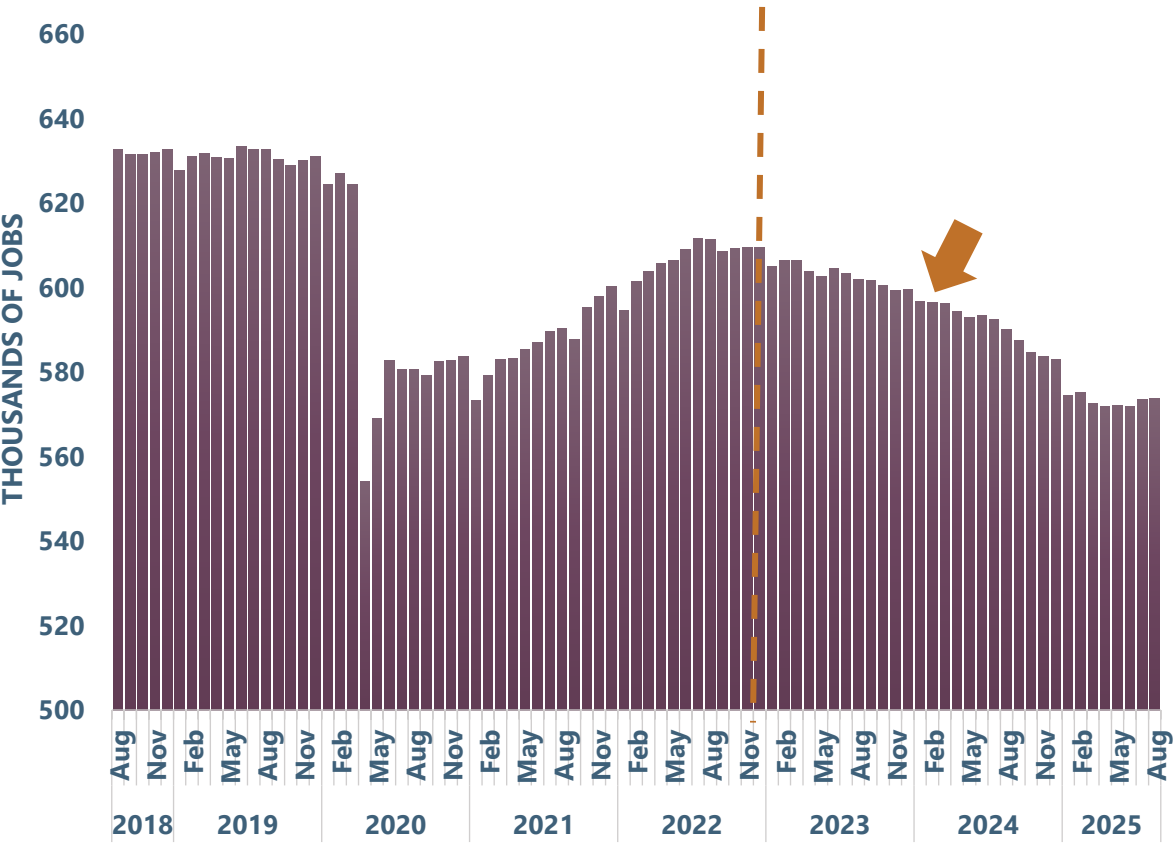
Hollywood and Manufacturing Jobs Impacted by AI

Employment in Motion Picture & Sound Recording in Los Angeles County



Source: California Employment Development Department

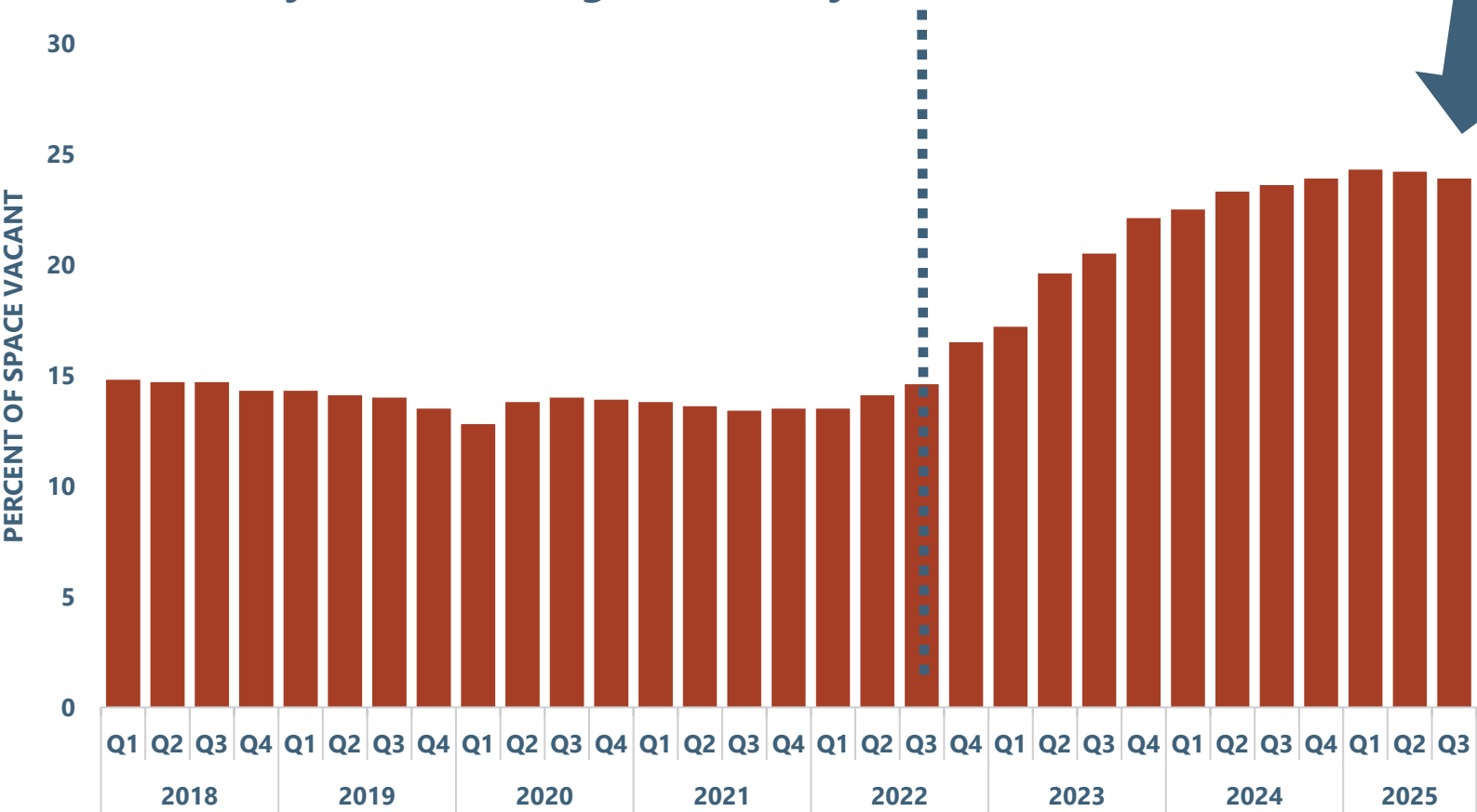
Employment in Manufacturing in SCAG Region



Source: California Employment Development Department

Office Market Weakness Further Extended by Weak Labor Market

Office Vacancy Rate, Los Angeles County

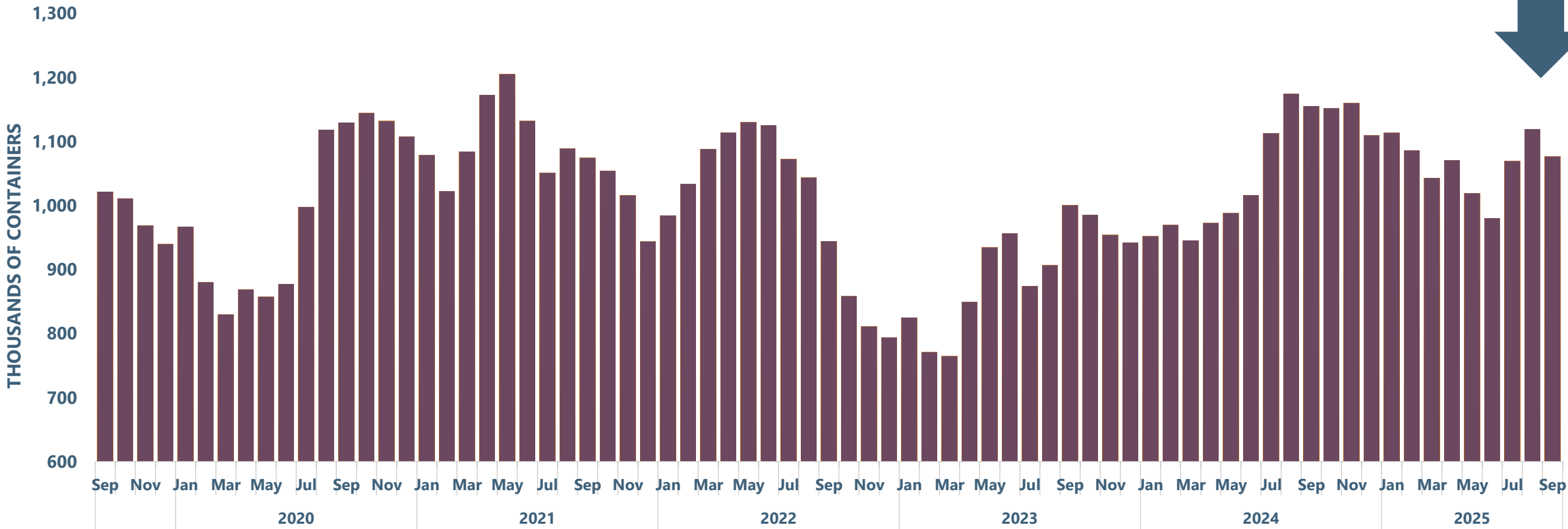


Office Vacancy Rates in SCAG Region	
Los Angeles County	23.9%
Orange County	19.0%
Ventura County	13.0%
Inland Empire	5.5%

Source: CBRE

Foreign Trade Volume into the SCAG Region is Higher this Year

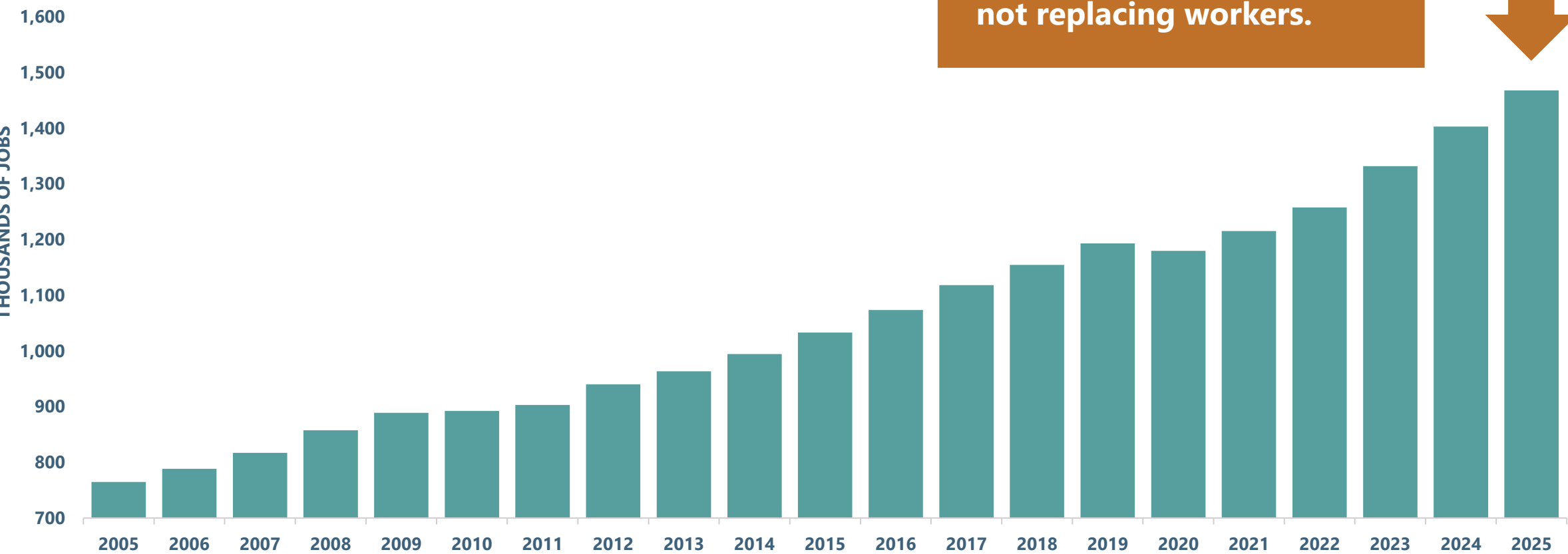
Container Volume at Ports of Los Angeles and Long Beach



Source: Port of Los Angeles Container Statistics and Port of Long Beach Container Statistics. Data reflects two-month smoothed average.

Healthcare has Been the Leading Sector for Job Creation Since 2023

Employment in Healthcare and Social Assistance



Source: California Employment Development Department. Data for 2025 is annualized based on year-to-date performance relative to the same period in 2024.

Just Completed in September: New Hospital at UCI Medical Campus

The new 350,000 square foot acute care hospital at the new UCI Medical Campus

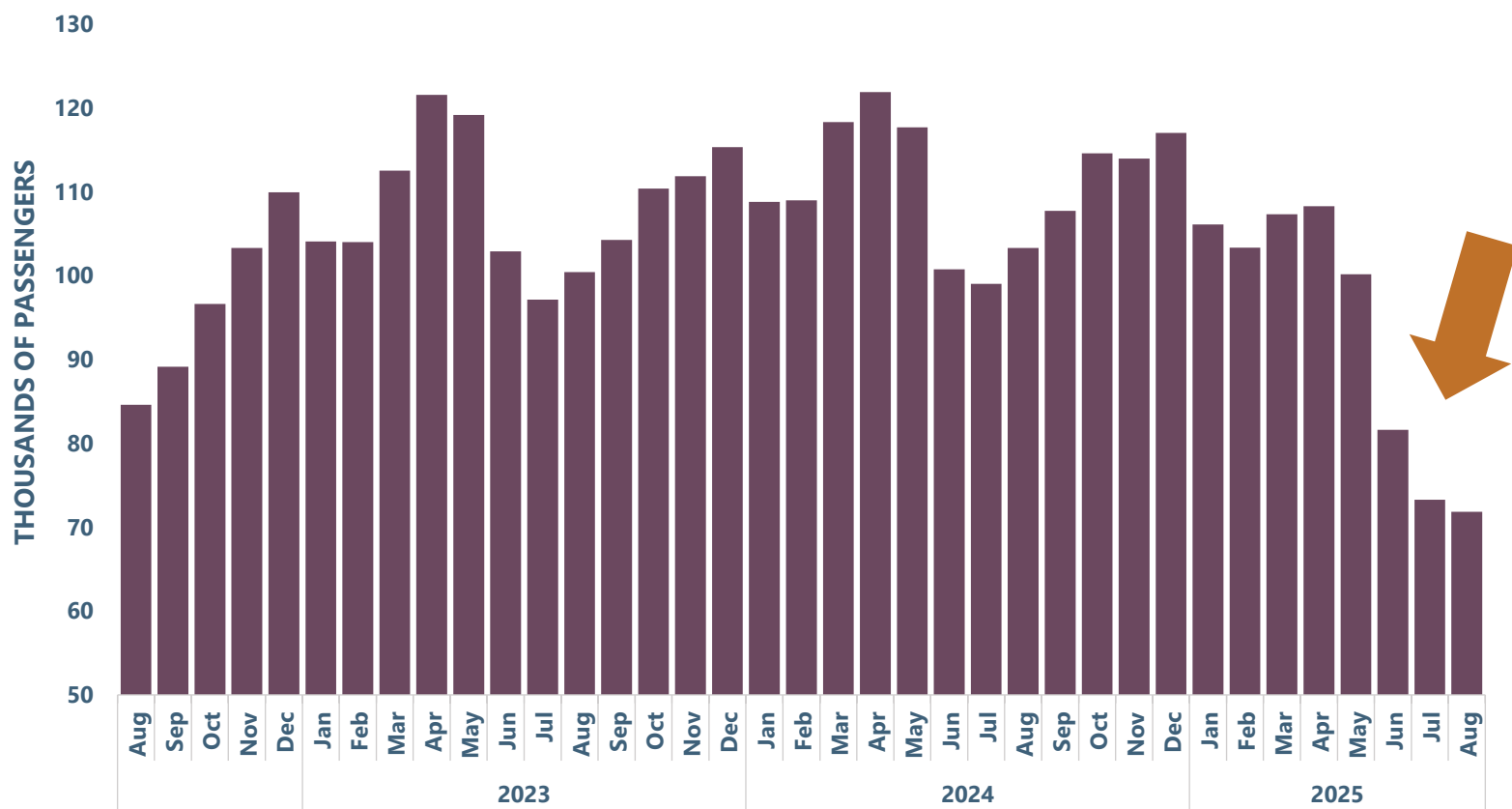


- The medical campus has been under construction since 2023.
- Total employment is estimated at 4,400 workers including physicians, nurses, clinical workers, and staff when hiring is completed.

Tourism in the Region has Softened Largely Due to Much Fewer International Visitors

- International arrivals at California Airports have declined five percent in 2025.
- European arrivals are off six percent, but Canadian arrivals at LAX are off 23 percent year-to-date.
- Attendance at Disneyland and Universal Studios was also lower this year; but lodging industry utilization is only slightly lower.

Airline Passengers Arriving in California from Canada



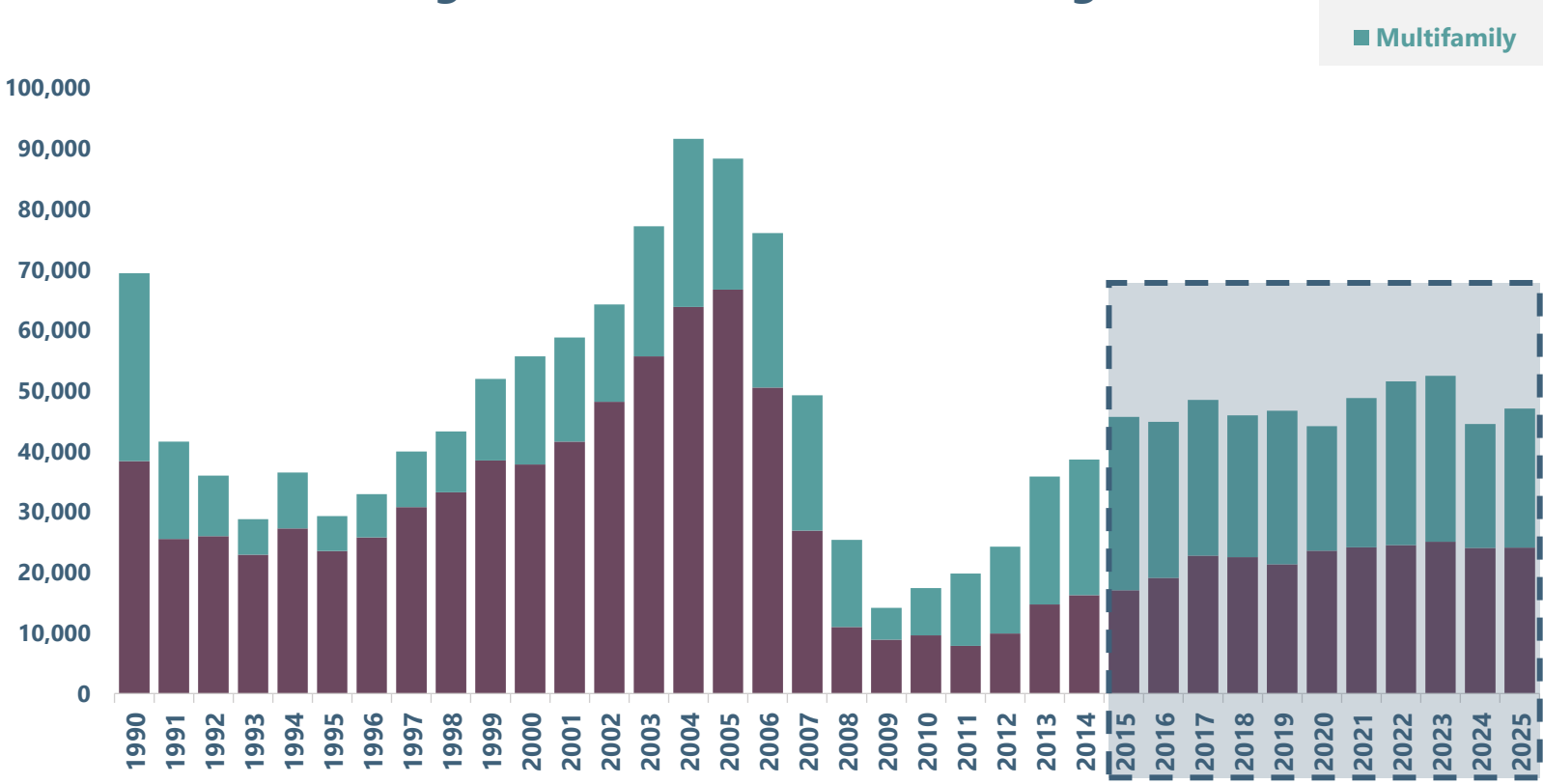
Source: Visit California. Data reflects three-month smooth average.

Momentum Absent for New Housing Development in SCAG Region

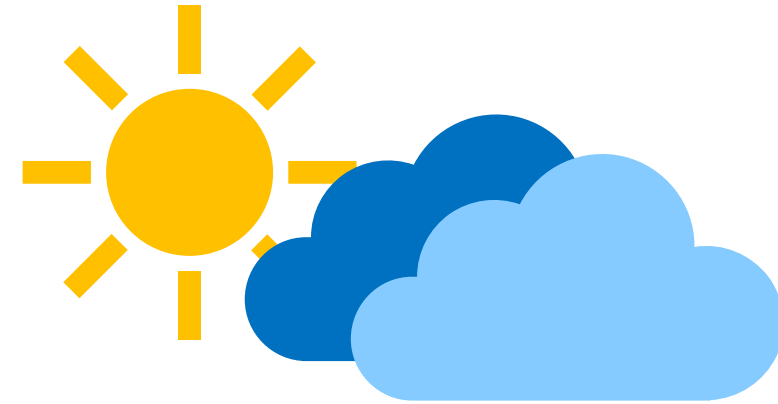
Largest Housing Projects Underway:

- Silverwood, ~**15,000 units**, San Bernardino County
- Valencia, ~**21,400 units**, North LA County
- Related Bristol, ~**3,500 units**, Santa Ana
- Disney Cotino, ~**2,000 units**, Rancho Mirage

Annual New Housing Units Permitted in SCAG Region



Source: Census Building Permits Survey. Data for 2025 is actual through 2025 and annualized over the remaining months based on the pace of permitting during 2010-2019.

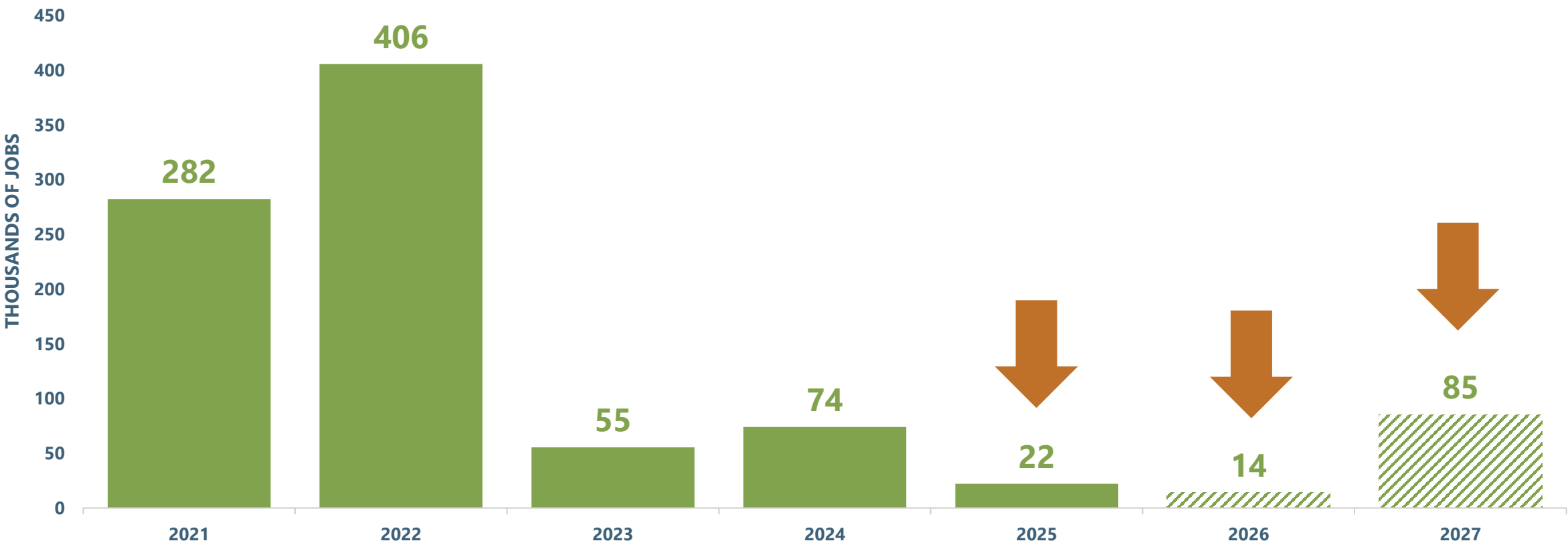


The Outlook for 2026

- Slower employment growth ahead:
 - **The adoption of AI systems by more firms remains a disruption to workforce expansion.**
 - **However, a regional economic downturn is not anticipated despite a weak job market.**
- Economic growth is expected to rise modestly as uncertainty regarding government downsizing, immigration policy, and trade policy diminish.
- An expansive consumer credit policy is underway with interest rate cuts in September, October, and likely December, and continuing into 2026.
- Inflation will move closer to the Federal Reserve's target of two percent.
- Growth in logistics and advanced manufacturing will create new employment opportunities as the onshoring of production evolves.

Weakness in Job Creation Continues in 2026; Then Growth Accelerates in 2027

Forecast for Job Creation in SCAG Region



Source: UCLA Anderson Forecast and California Economic Forecast

The Outlook for 2026

- The expansion of healthcare will continue to dominate the labor market.
- New housing construction and existing home sales should increase in tandem with lower borrowing costs and higher household incomes.
- AI adoption will continue to broaden, and consequently, demand for data, data centers, software, and energy to support data centers will remain a principal engine of growth for the California economy.
- However, the labor market will be threatened if new jobs created by AI don't offset jobs replaced by AI.



Imperial County

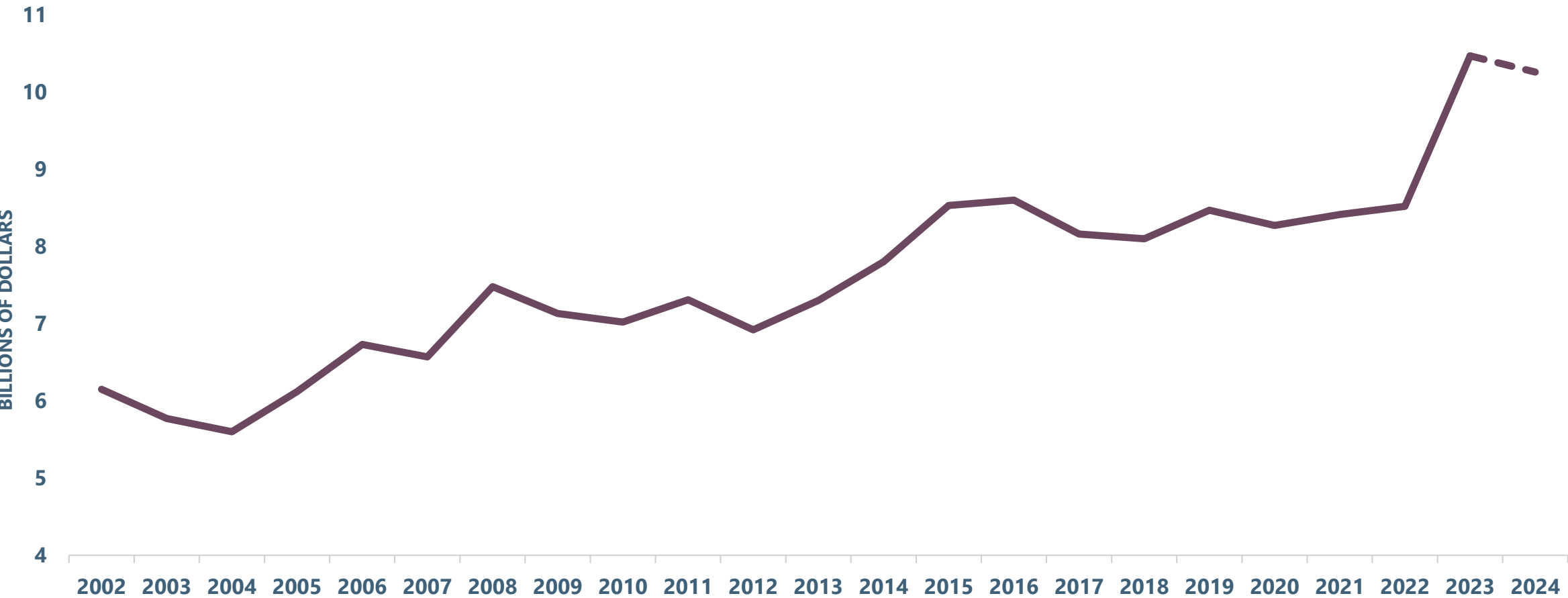
Michael Bracken
Managing Partner & Chief Economist,
Development Management Group, Inc.

Imperial County 2025 Highlights

- Estimated Gross Domestic Product (2023): **\$10.47 billion** (\$56,124 *per capita*)
- Median Household Income (2024): **\$62,400**
- Unemployment Rate: **21.5 percent**
- Agriculture Production: **\$2.49 billion**
- Renewable Energy Production (2024): **9,395 GWh** (*3rd in California*)
- Geothermal/Lithium Extraction
 - **13** known projects in pipeline
 - **\$16.8 billion** economic investment (potential)
 - **7,000** 1-Year FTE Construction Jobs/
1,050 Operational Jobs

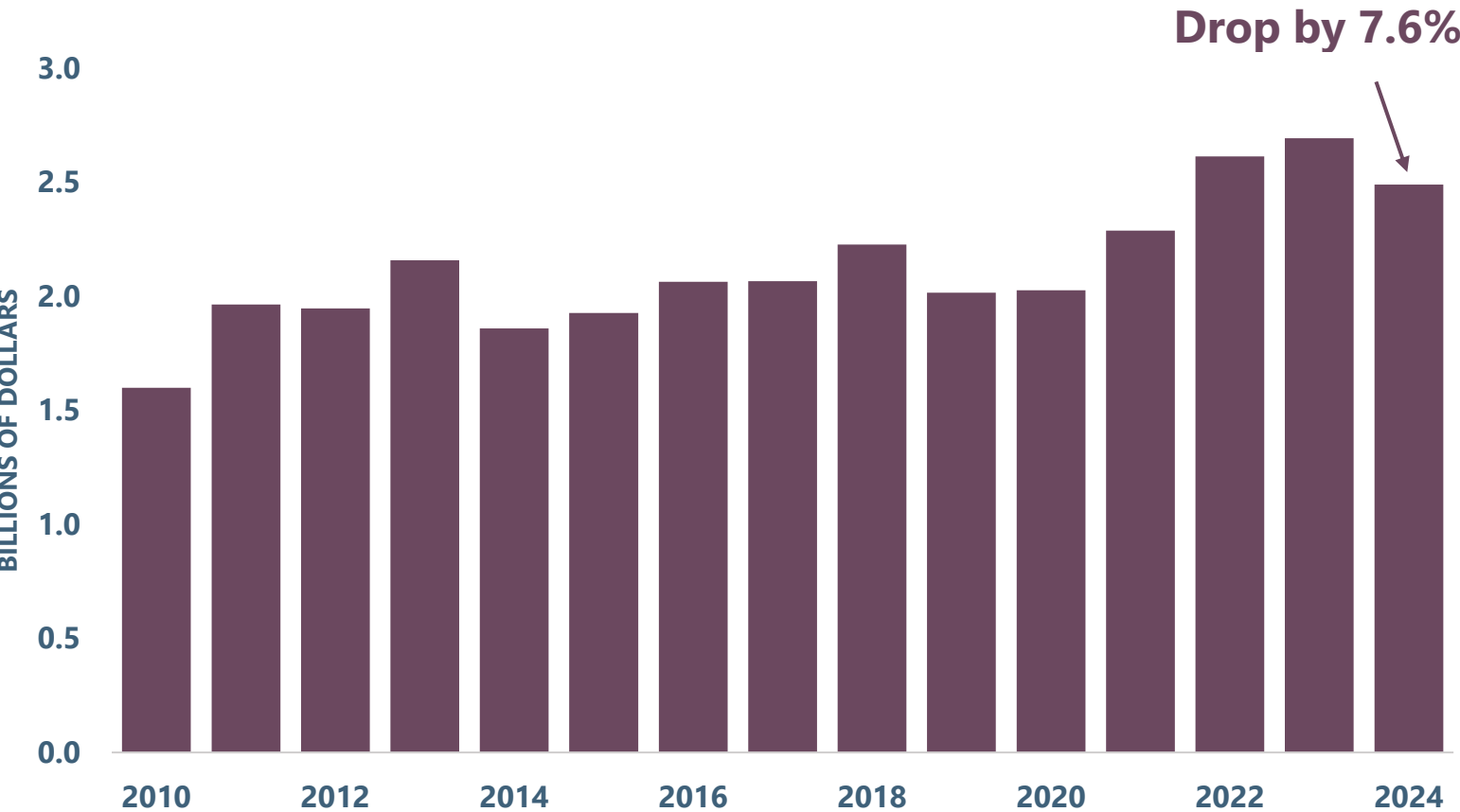


Imperial Gross County Product



Source: FRED, Federal Reserve Bank of St. Louis; Gross County Product is forecasted for 2024.

Agricultural Production in Imperial County

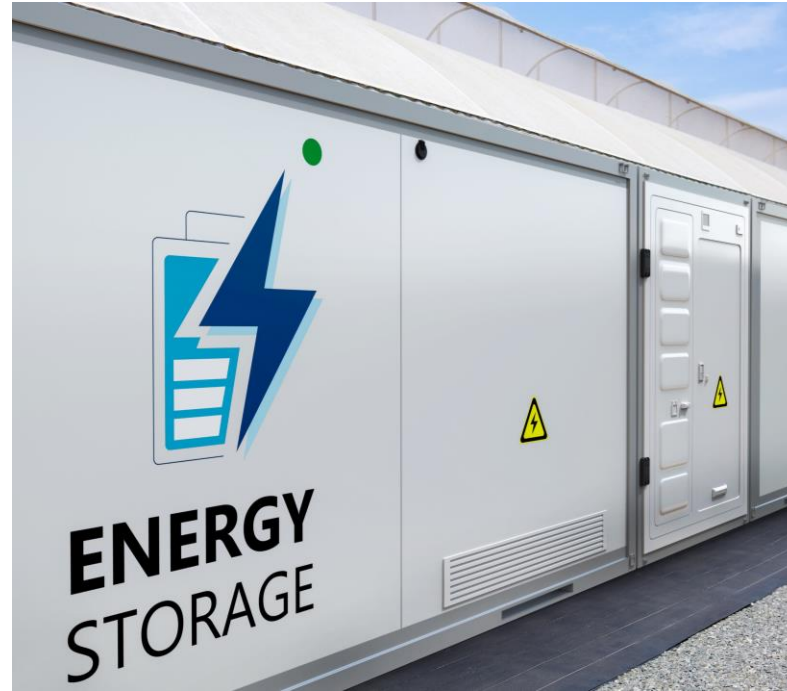


Source: County of Imperial Agriculture Commissioner

The pullback in agricultural production was due to:

- The implementation of the Imperial Irrigation District Deficit Irrigation Program (DIP).
- Decreases in total acres in production of both vegetables and seed/nursery products.

Imperial County Continues to See Investment in Solar Production and Battery Storage



Source: Energy Storage, County of Imperial

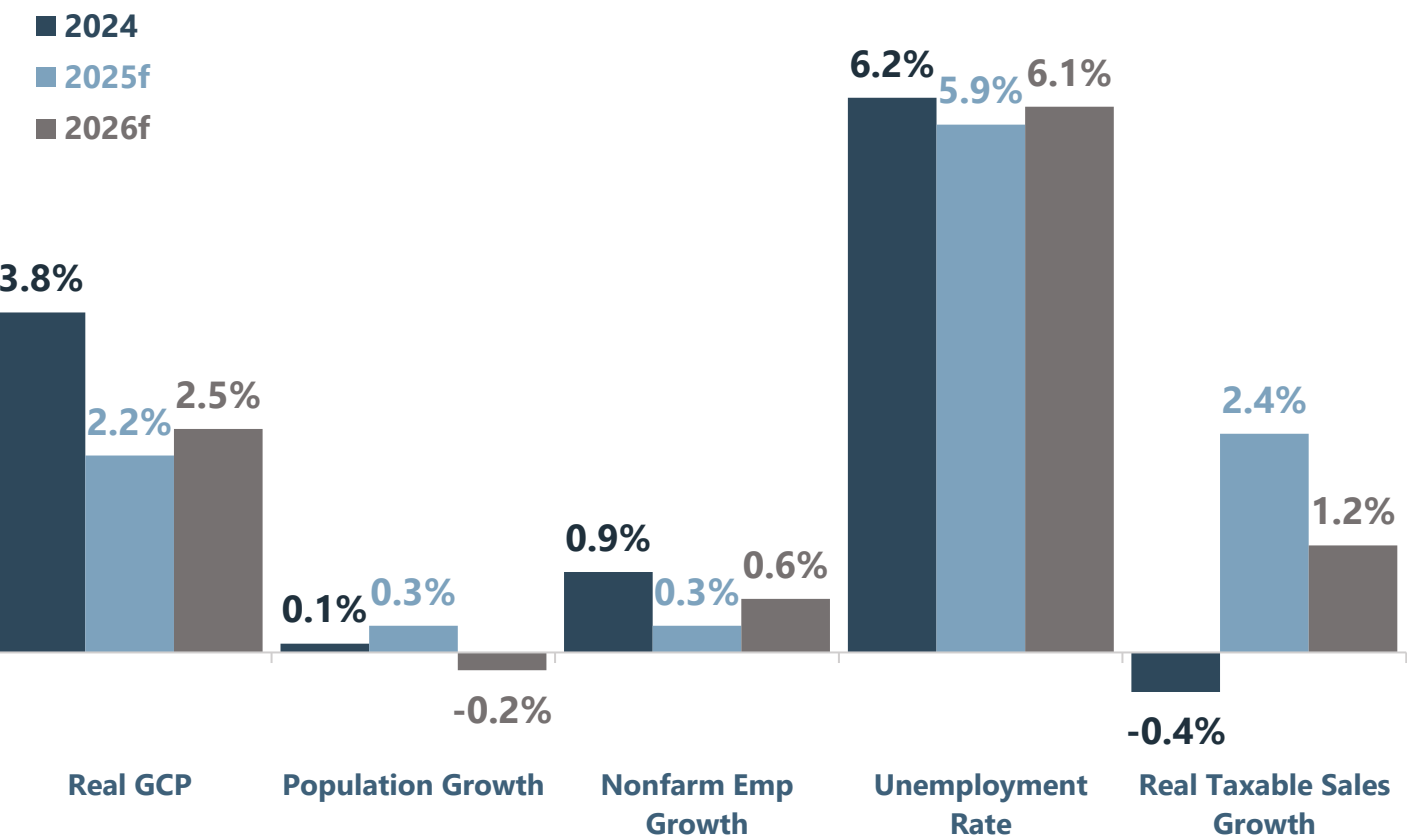


Los Angeles County

Shannon M. Sedgwick
Senior Director, Institute for Applied Economics
Los Angeles County Economic Development Corporation (LAEDC)

Payroll Employment in Los Angeles County

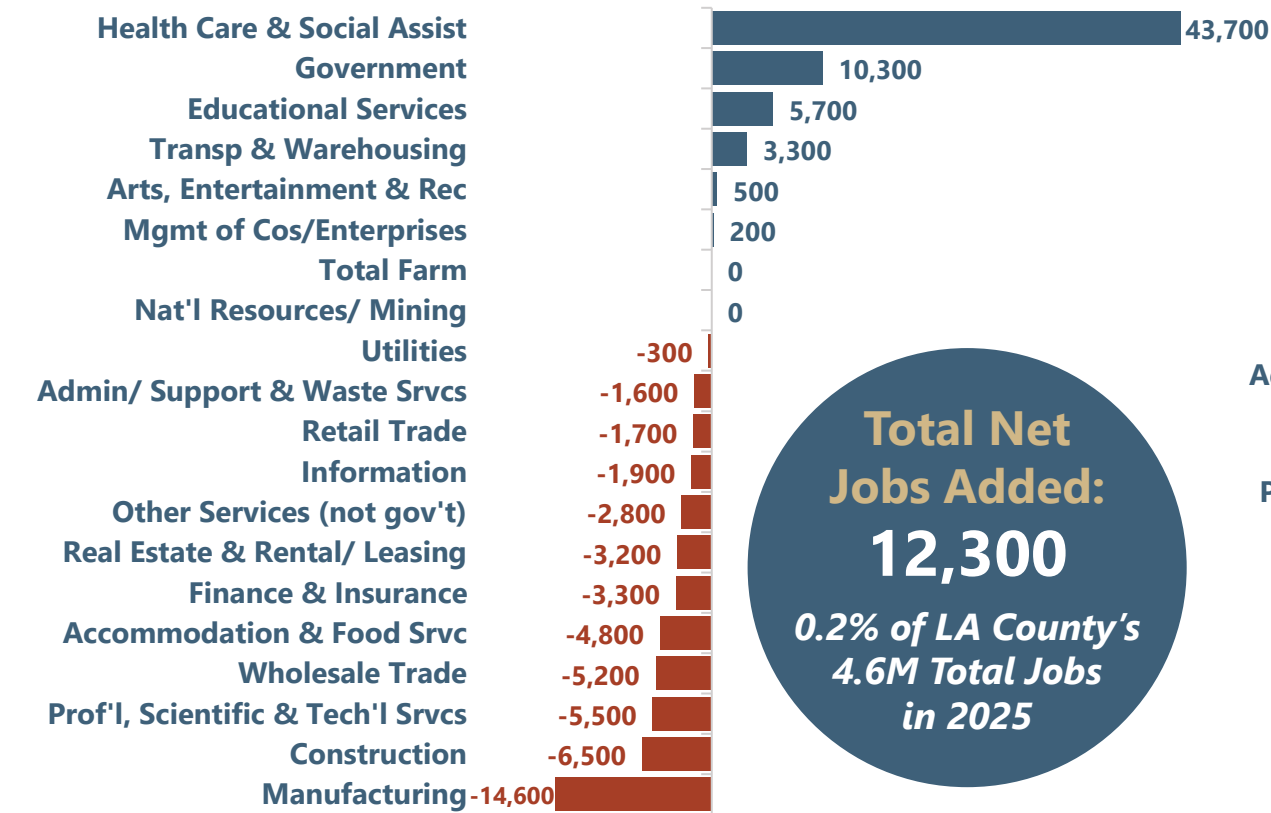
LAEDC Economic Outlook: Los Angeles County



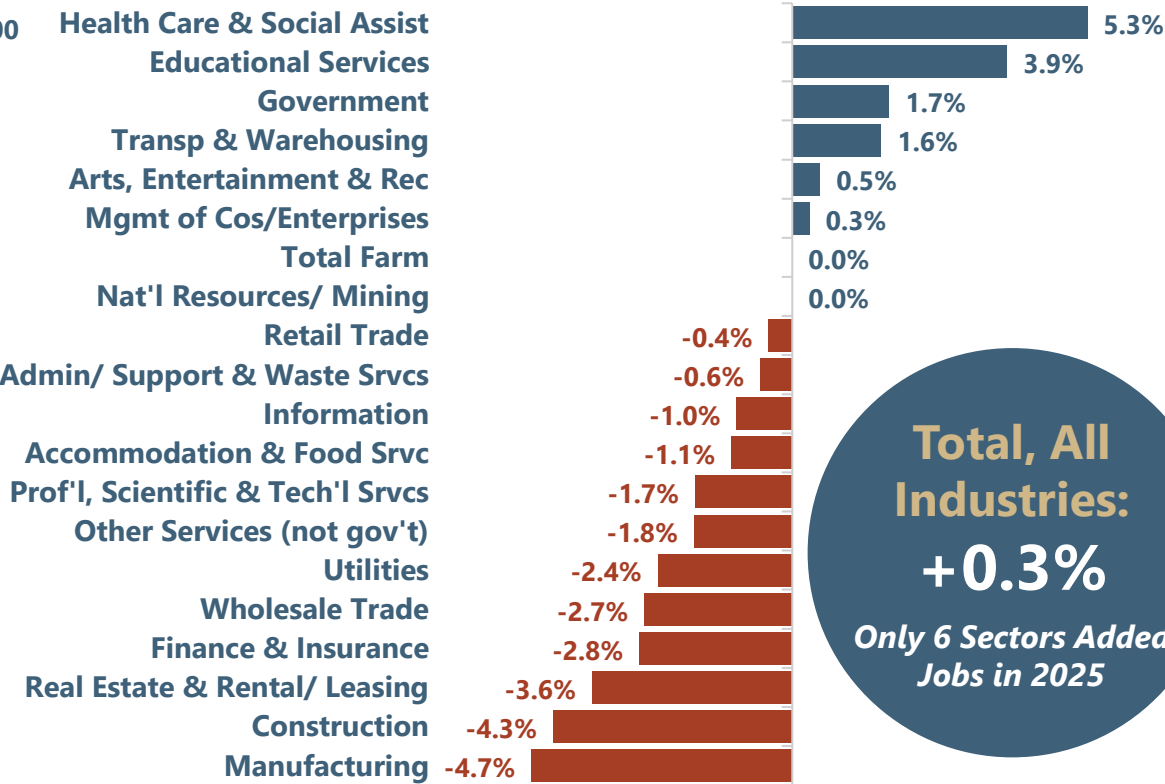
- As the largest county economy in the U.S., Los Angeles County remains a critical economic hub for the SCAG region and the rest of California.
- Despite facing a series of severe challenges in 2025, from the devastating Palisades and Eaton wildfires to tariff levels unseen since the Great Depression, to aggressive federal immigration enforcement, Los Angeles County’s economy has demonstrated impressive resilience.
- As we approach 2026, new headwinds loom on the horizon for Los Angeles County related to HR1.

Payroll Employment Growth in Los Angeles County Stalls

Numerical Change from 2024 to 2025 Forecast



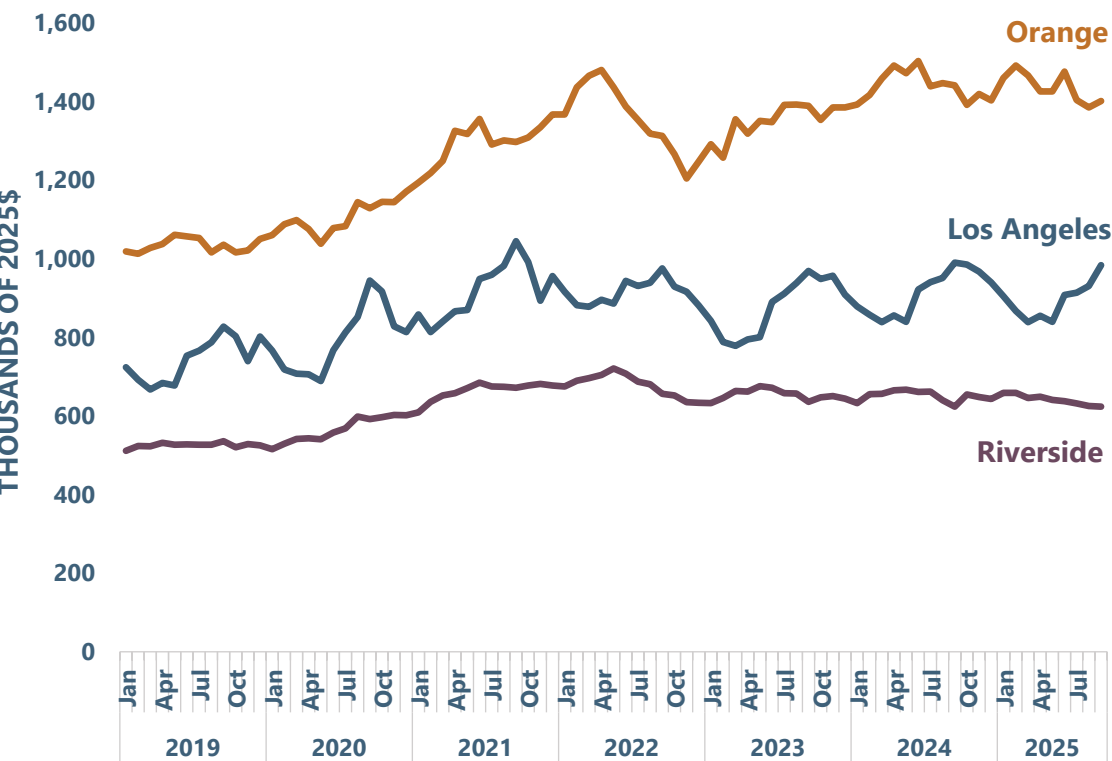
Percentage Change from 2024 to 2025 Forecast



Sources: California Employment Development Department (CA EDD), Labor Market Information Division; and Los Angeles County Economic Development Corporation (LAEDC) Employment Forecast

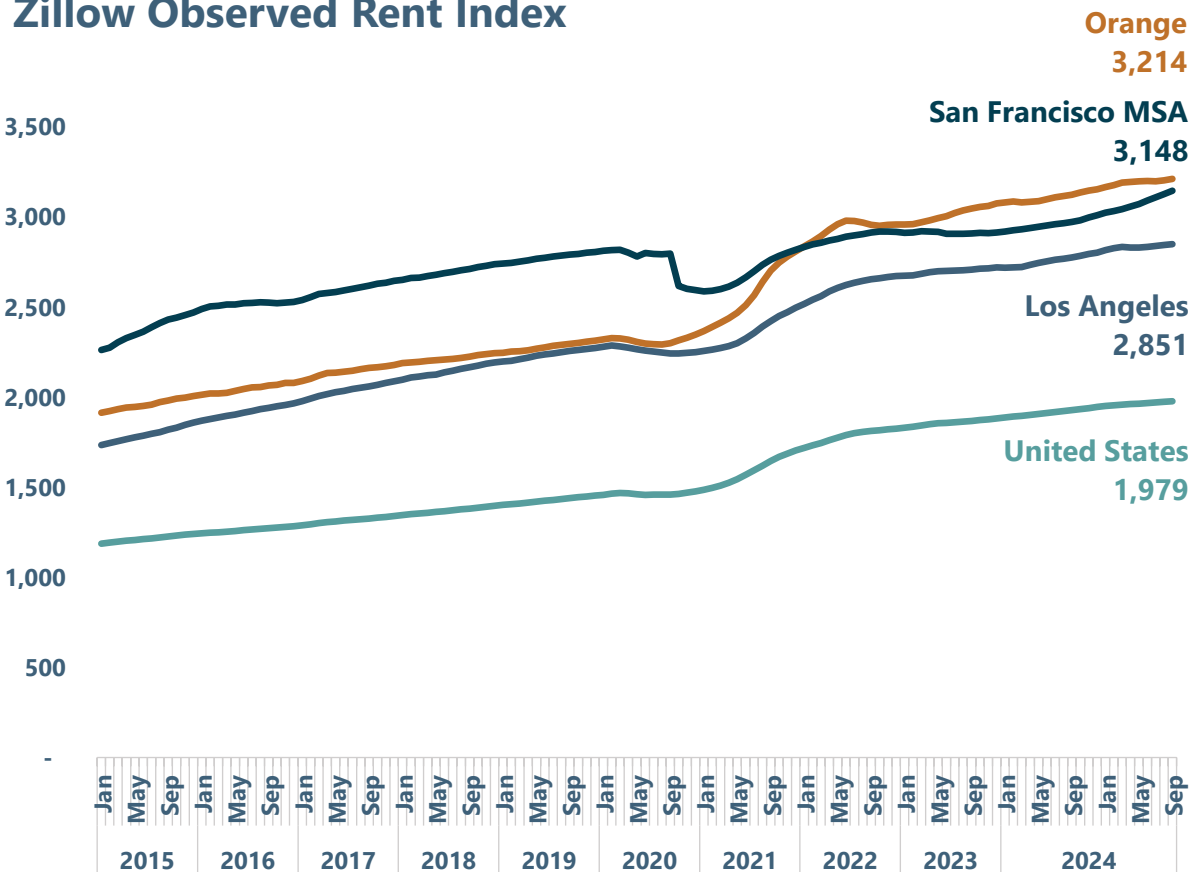
High Housing Costs Continue to be Challenging

Real Median Home Prices for Single Family Homes in Los Angeles, Orange, and Riverside



Sources: California Association of Realtors

Zillow Observed Rent Index



Source: Zillow

Moving into 2026...



Broad Industry Base

Los Angeles County's diverse mix of health care, logistics, creative industries, advanced manufacturing, and public-sector employment continues to provide stability and balance, helping the region absorb sector-specific disruptions and sustain overall growth.



Skilled Workforce

A deep labor pool supported by world-class universities, community colleges, and training institutions positions the County to meet evolving industry needs, even as technological change and demographic shifts reshape workforce demand.



Global Connectivity

With the nation's busiest port complex, international airports, and strong ties to global markets, Los Angeles remains a critical gateway for trade, investment, and cultural exchange—bolstering its role in regional and national economic activity.



Headwinds

High living costs, slowing population growth, tighter financing conditions, impacts of HR1, and uncertainty around federal trade and immigration policy continue to influence business decisions, household stability, and pace of economic expansion heading into 2026.



Orange County

Wallace Walrod, Ph.D.
Founder and Managing Partner, Tech Coast Consulting Group

Orange County Characteristics Compared to Regional Peers (2025)

County	Median Household Income	Median Age	Poverty Level (%)	Mean Commute Time (In Minutes)	Foreign-born Population (%)
Orange	\$110,042	39.7	9.1%	27.1	30.8%
San Diego	\$103,674	37.6	10.1%	25.7	23.1%
Los Angeles	\$86,587	38.6	13.7%	31.4	33.5%
Riverside	\$90,527	37.1	11.3%	34.1	22.1%
San Bernardino	\$85,069	34.9	13.1%	32.3	22.6%
Ventura	\$107,667	40.2	9.3%	26.7	22.9%
Imperial	\$60,243	34.0	19.6%	19.3	30.7%
California (Statewide)	\$95,521	38.2	12.0%	29.2	27.3%

Source: U.S. Census Bureau, American Community Survey, 1-year Estimates

Gross Regional Product and Employment Comparison by Southern California County

County	Total Pop. (2025)	Total Emp. (June 2025)	Total GRP (\$ in B)	Emp. Per Square Mile	Emp. Per Capita	GRP Per Square Mile	GRP Per Capita
Orange	3,175,427	1,564,900	\$348	1,959	0.49	\$435,389,002	\$109,552
San Diego	3,330,139	1,591,200	\$332	404	0.48	\$84,242,349	\$99,721
Los Angeles	9,876,811	4,743,500	\$984	1,169	0.48	\$242,399,738	\$99,593
San Bernardino	2,207,424	978,000	\$134	49	0.44	\$6,655,660	\$60,474
Ventura	829,590	404,600	\$66	219	0.49	\$35,764,323	\$79,453
Imperial	179,057	60,500	\$9.3	15	0.34	\$2,217,704	\$51,734
Riverside	2,495,640	1,121,900	\$128	156	0.45	\$17,721,935	\$51,171

Source: Lightcast; California Employment Development Department; State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2025. Sacramento, California, May 2025.

Orange County Remains a Resilient Economic Engine

- **Regional Economic Engine:** 203,000 more workers commute into OC on a daily basis, than commute out. OC is a net importer of workers from each surrounding county.
- **Educational Attainment Remains a Regional Competitive Advantage:** the share of residents with a Bachelor's degree or above reached 44.5 percent. 57.3 percent of Orange County high school seniors graduating are eligible to attend UC/CSU schools, significantly higher than the state average of 51.9 percent.
- **Lowest Unemployment Rate in SCAG Region:** 4.1 percent unemployment and strong job growth in healthcare.
- **Dynamic Innovation:** A leader in life sciences, aerospace/defense, semiconductors & hardware, AI & ML, robotics & drones, and augmented reality, attracting billions in VC.
- **Positive Business Outlook:** CSUF's business expectations index recovered to a positive 74.4.

Persistent Workforce Housing Challenges

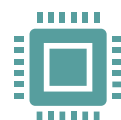
- **Workforce Housing** remains the biggest headwind, putting pressure on residents and businesses.
- Severe affordability issues with home prices at \$1.4 million and rents over \$3,200 despite a 7.6 percent increase in building permits year-over-year.
- Despite job growth and rising wages, only 12 percent of buyers can afford a median-priced home.
- Only 18 percent of first-time homebuyers can afford a new home – 3rd lowest affordability in the state.
- **Impact:** Difficulty attracting and retaining young workers is shifting the county's age profile., leading to an aging population.

A Hub for Innovation



Life Sciences

Highest industry concentration in the county (LQ: 3.27). This well-established sector is projected to see significant 12.1% CAGR employment growth by 2035.



Semiconductors & Hardware

Second Highest industry concentration in the county (LQ: 2.46). Current average wage of \$147,415 is projected to grow by 73% over the next 10 years



Aerospace & Defense

A high-paying sector with an average annual salary of \$153,083 and a strong regional concentration (LQ: 2.05), fueled by major firms like Anduril.



AI & Robotics

Rapidly growing in venture capital, attracting \$2.6 billion YTD 2025. This sector is a primary focus for new investment and innovation.

Venture Capital Investment (2023-2025 YTD)

Top Verticals in 2023	Investments (Millions of \$)	Top Verticals in 2024	Investments (Millions of \$)	Top Verticals YTD 2025	Investments (Millions of \$)
Artificial Intelligence & Machine Learning	\$2,320	Artificial Intelligence & Machine Learning	\$1,910	Artificial Intelligence & Machine Learning	\$2,620
Robotics and Drones	\$2,200	Augmented Reality	\$1,530	Robotics and Drones	\$2,600
Augmented Reality	\$2,010	Robotics and Drones	\$1,500	Augmented Reality	\$2,500
HealthTech	\$422	HealthTech	\$278	HealthTech	\$234
Life Sciences	\$393	SaaS	\$241	SaaS	\$149
CleanTech	\$347	Life Sciences	\$172	CleanTech	\$107
Climate Tech	\$276	FinTech	\$161	Mobility Tech	\$103
LOHAS & Wellness	\$175	Gaming	\$157	Autonomous Cars	\$100
Manufacturing	\$150	CleanTech	\$131	Climate Tech	\$100
Oncology	\$113	Manufacturing	\$121	Manufacturing	\$83
Gaming	\$111	Climate Tech	\$102	Life Sciences	\$81
SaaS	\$89	Mobile	\$101	Legal Tech	\$76
Big Data	\$56	Mobility Tech	\$98	Space Technology	\$64
FinTech	\$53	Autonomous Cars	\$96	LOHAS & Wellness	\$39
All Other Verticals	\$380	All Other Verticals	\$434	All Other Verticals	\$106

Source: Pitchbook; YTD 2025 measured from 01/01/2025 to 07/31/2025
SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS



Riverside and San Bernardino Counties

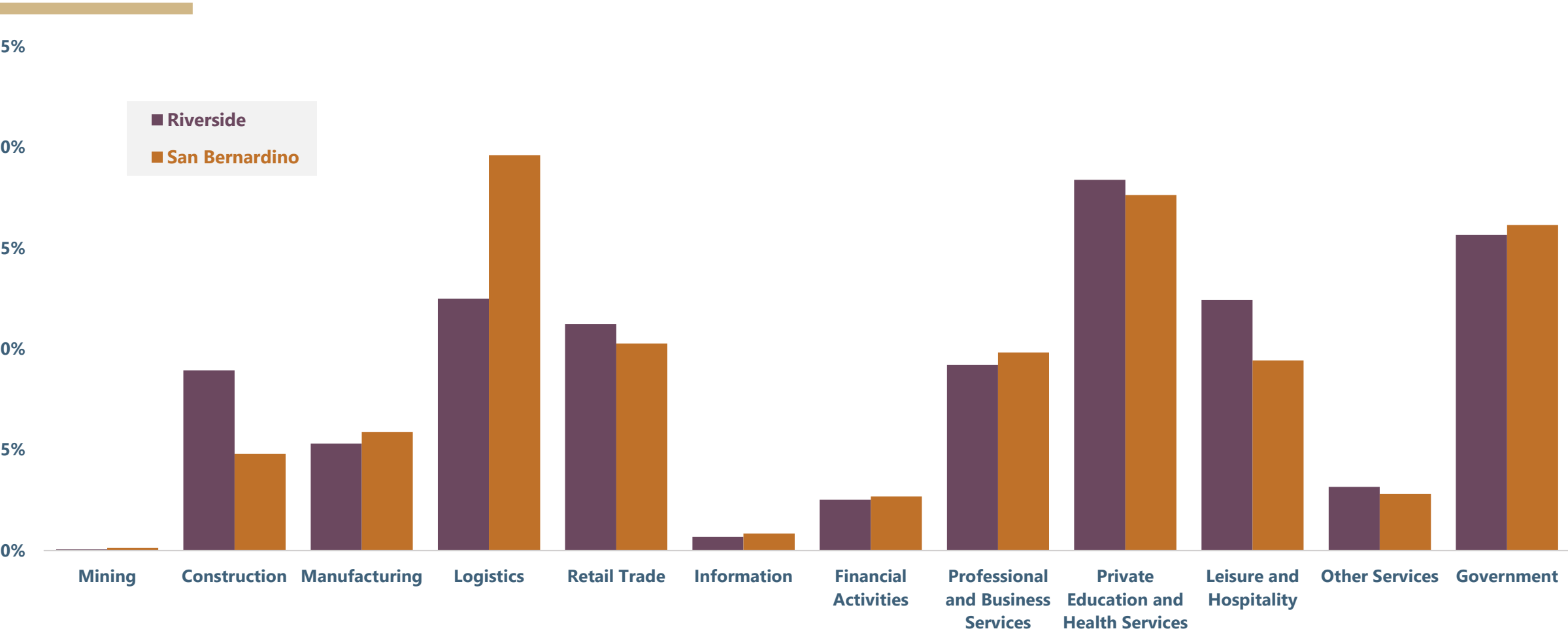
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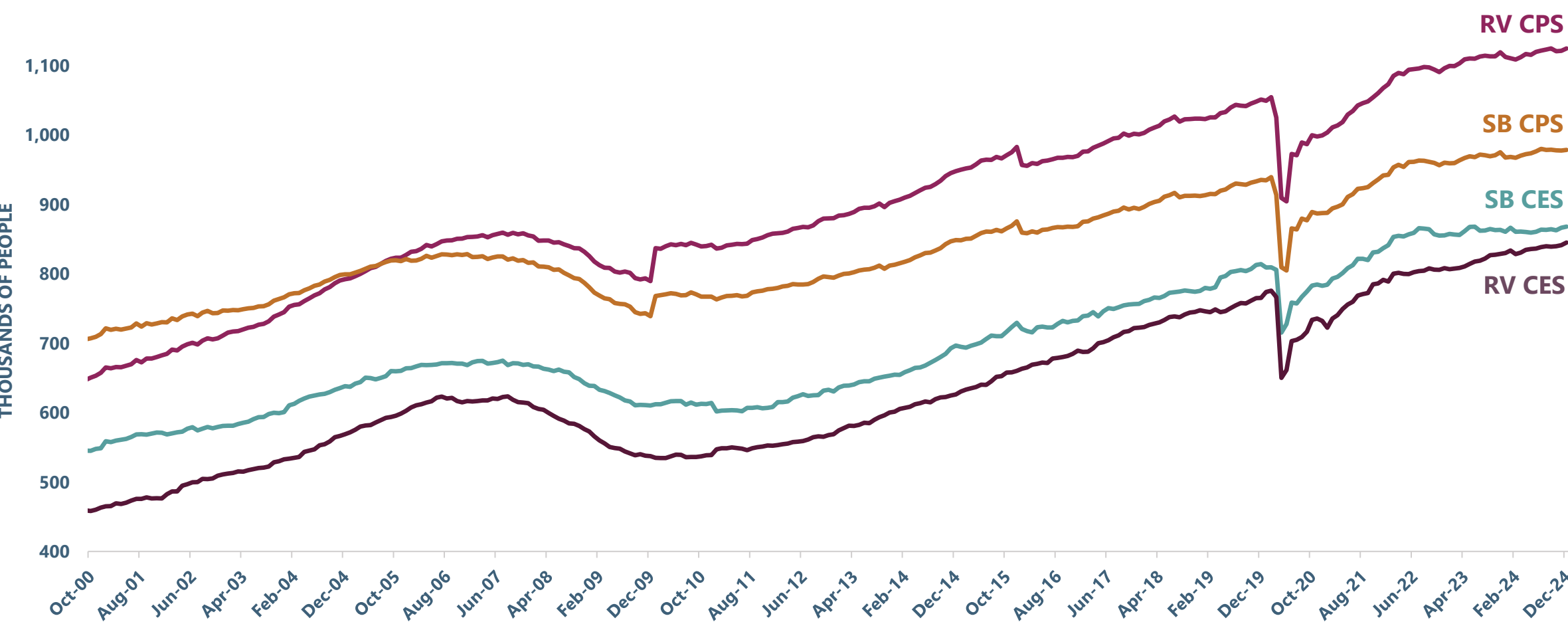
Principal Economist, Kleinhenz Economics

Employment Shares by Industry, Riverside County and San Bernardino County, 2024



Source: California Employment Development Department

Household Employment (CPS) vs. Employment by Establishment (CES), Riverside County (RV) and San Bernardino County (SB)



Source: California Employment Development Department

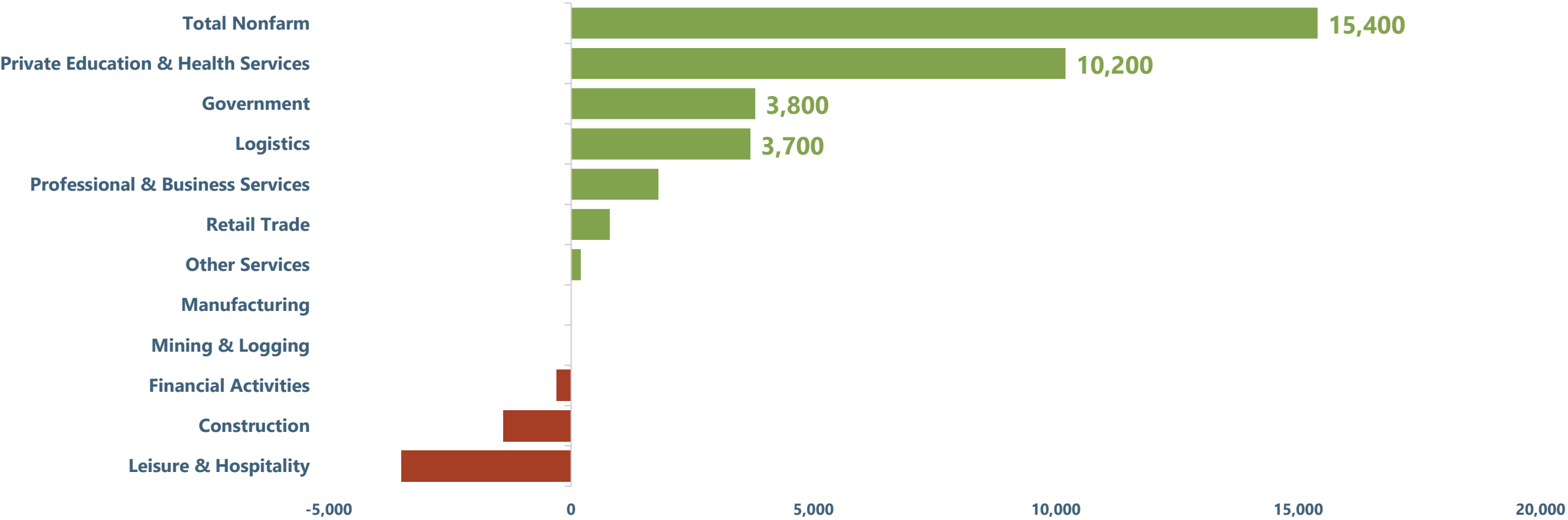
Commuting Patterns by County within the Inland Empire

	INTO San Bernardino	FROM San Bernardino	INTO Riverside	FROM Riverside
San Bernardino	--	--	78,500	114,000
Riverside	114,000	78,500	--	--
Los Angeles	61,000	133,000	17,000	53,000
Orange	13,000	37,000	16,000	76,000
San Diego	1,000	3,000	7,000	47,000
Total	189,000	251,500	118,500	290,000
Share of Total Employment	23%	30%	14%	34%

Source: 2016-2020 Census Journey-to-Work files

Employment by Sector, Riverside County

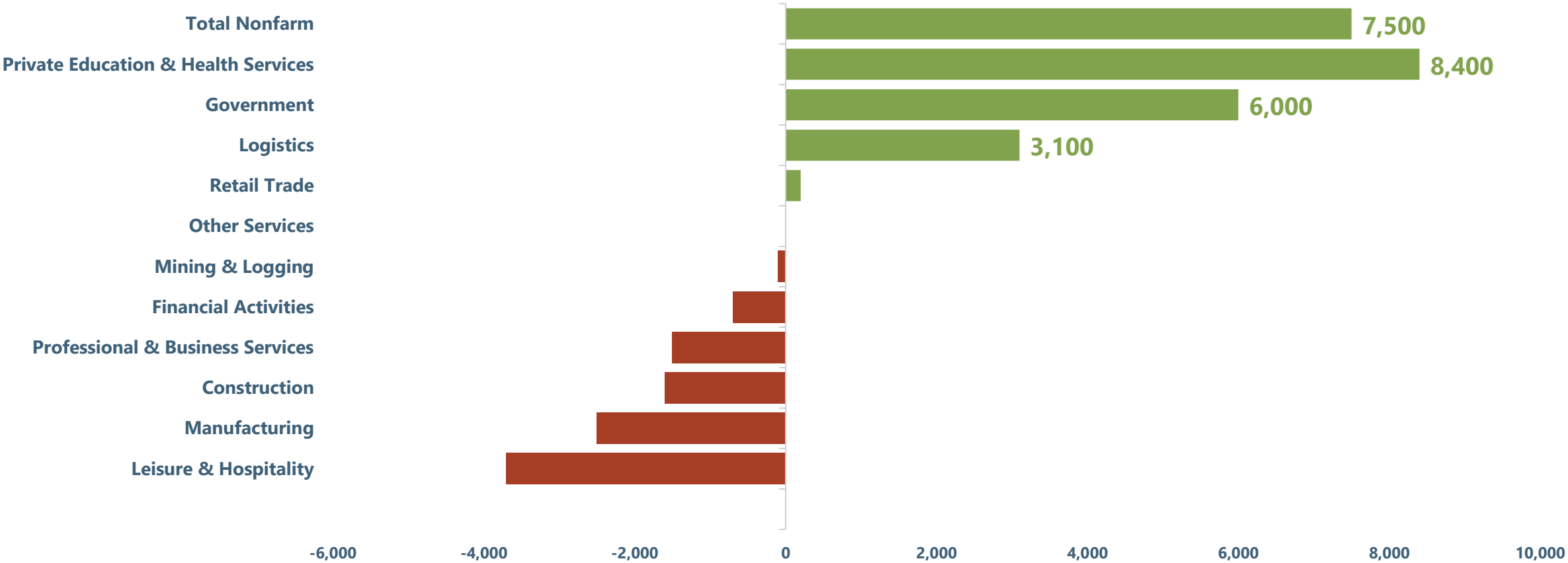
Job Growth by Sector (2023 Q4 - 2024 Q4), Riverside County



Source: California Employment Development Department.

Employment by Sector, San Bernardino County

Job Growth by Sector (2023 Q4 - 2024 Q4), San Bernardino County



Source: California Employment Development Department.



Ventura County

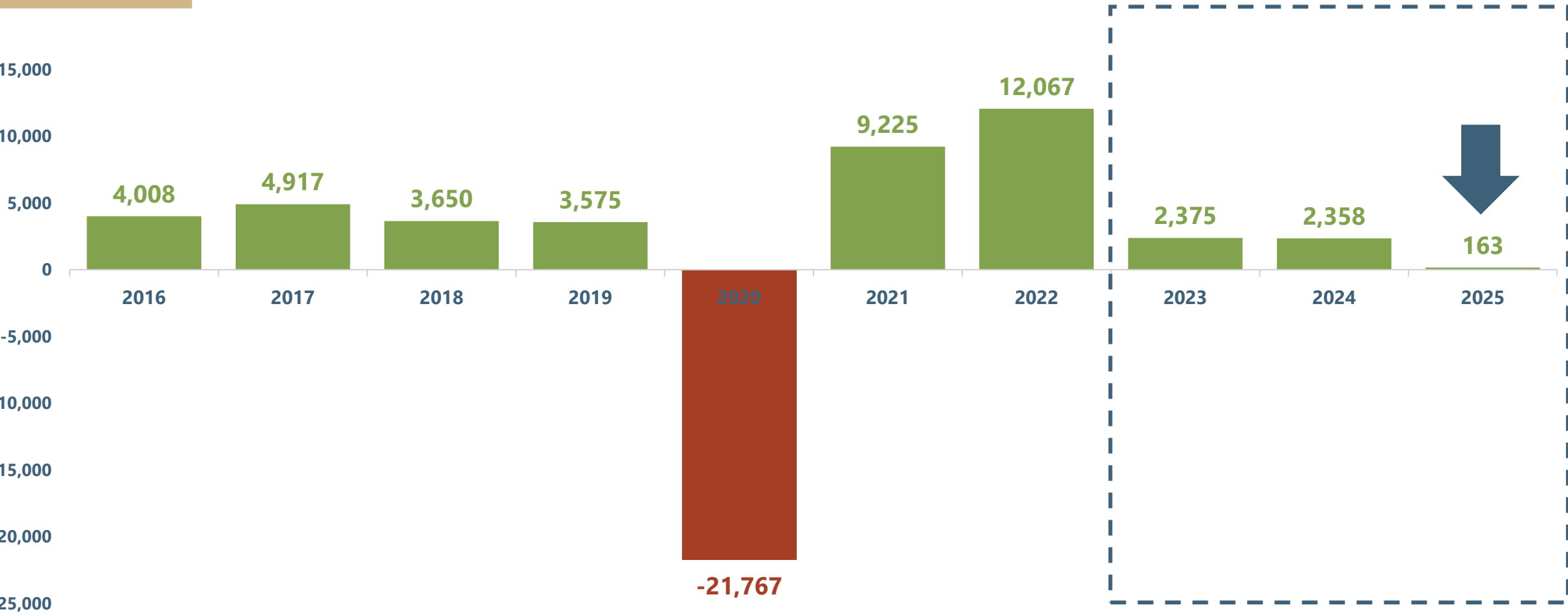
Mark Schniepp, Ph.D.
Director, California Economic Forecast

Ventura County 2025 Highlights

- Like the rest of the SCAG region, labor market growth is non-existent
- Unemployment rate is still low at 4.8 percent.
- Cargo imports through the Port of Hueneme impacted by Tariffs are down 17 percent this year.
- The population decline in Ventura County was interrupted in 2024 but will likely resume this year with the change in immigration policy.
- Little evidence of accelerating momentum in any economic sector.
- Total production of fruit and vegetables continues to contract in the \$2.3 billion farm sector.
- New housing development is the looming exception, rising in 2024 and 2025.



New Jobs Created in Ventura County



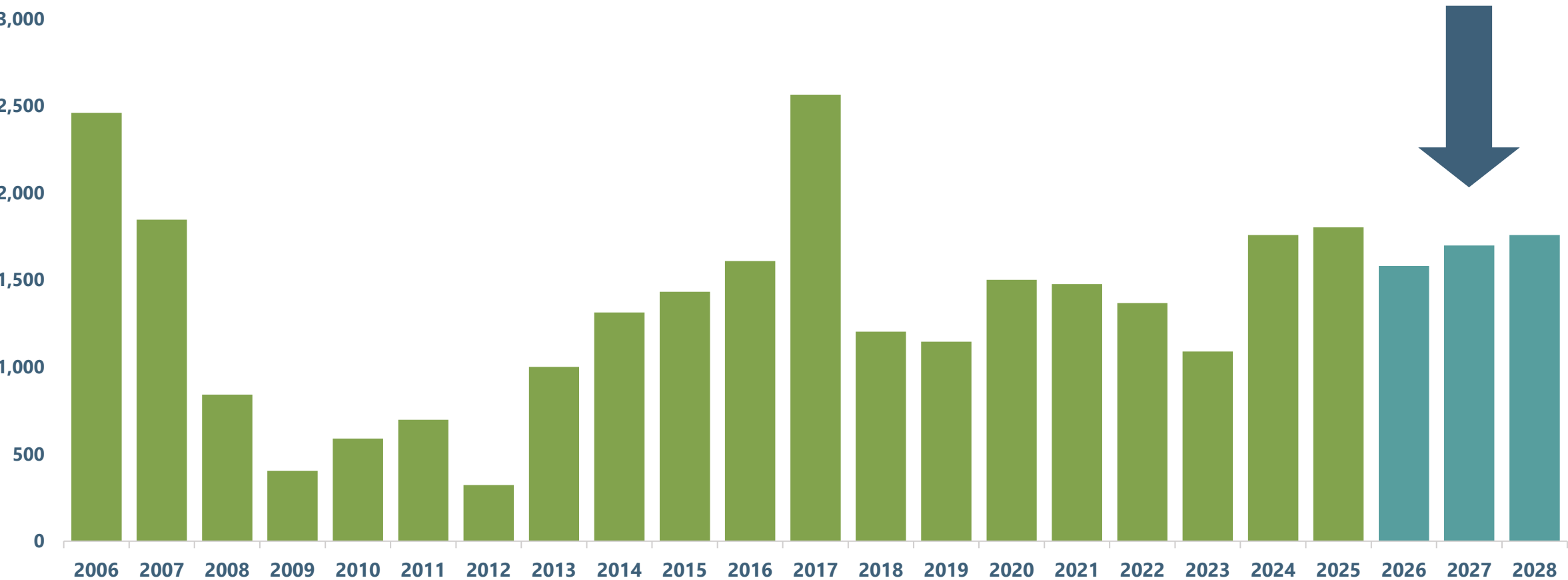
Source: California Employment Development Department. Data for 2025 is annualized based on year-to-date performance relative to the same period in 2024.

Ventura County 2025 Outlook

- AI and the lack of new business growth will limit the extent of job creation in 2026 and (likely) beyond.
- Out-migration of the under-65 population is shaping the demographic profile and limiting labor force growth.
- With very little growth in the labor force, the lack of job growth may not represent a looming concern.
- Port of Hueneme cargo imports—automobiles—should rebound as importers & exporters acclimate to the new trade climate.
- New development of housing will remain a principal engine of growth which should help to limit the population and labor force decline.



New Residential Units in Ventura County



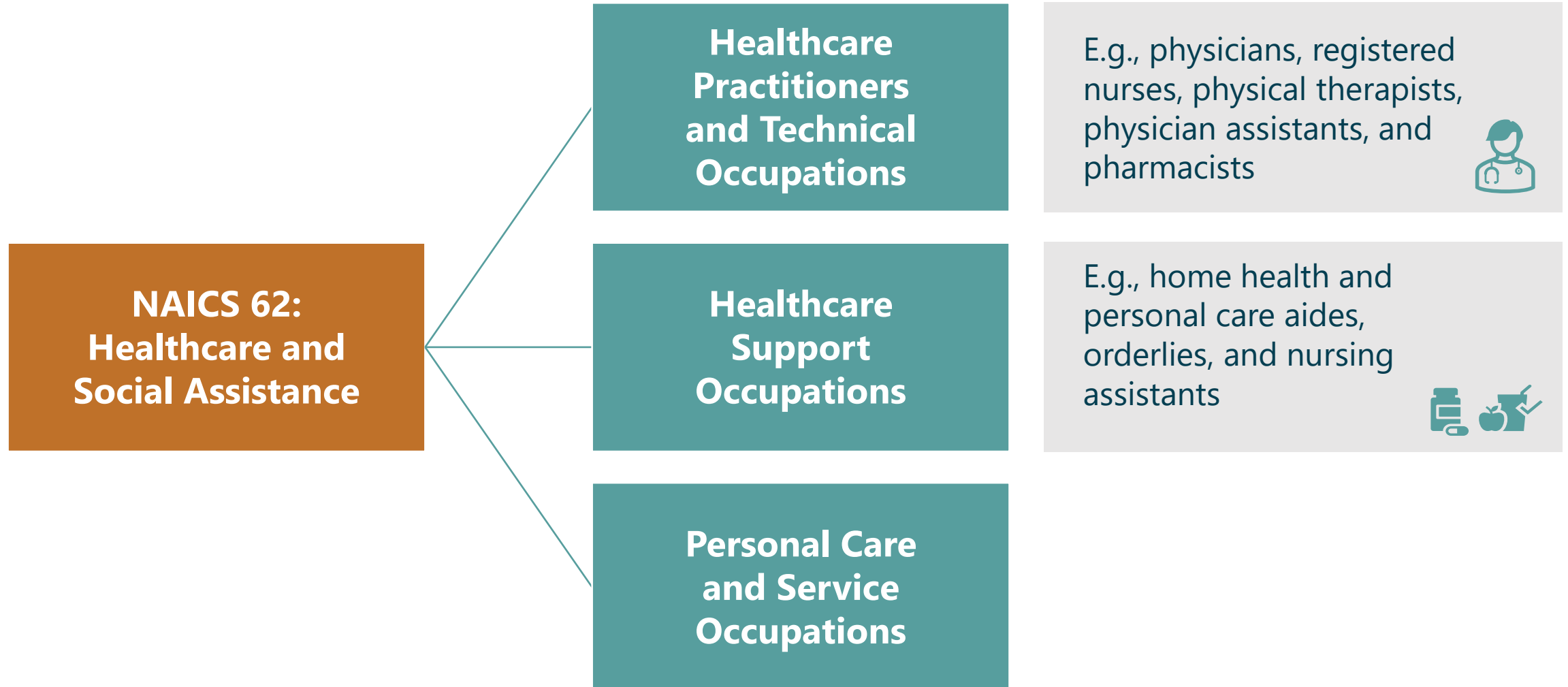
Notes: Data for 2025 is actual through August 2025 and annualized over the remaining months based on the pace of permitting during 2010-2019. New residential units are forecasted for 2026-2028 by California Economic Forecast.



Economic Opportunity in Healthcare Occupations

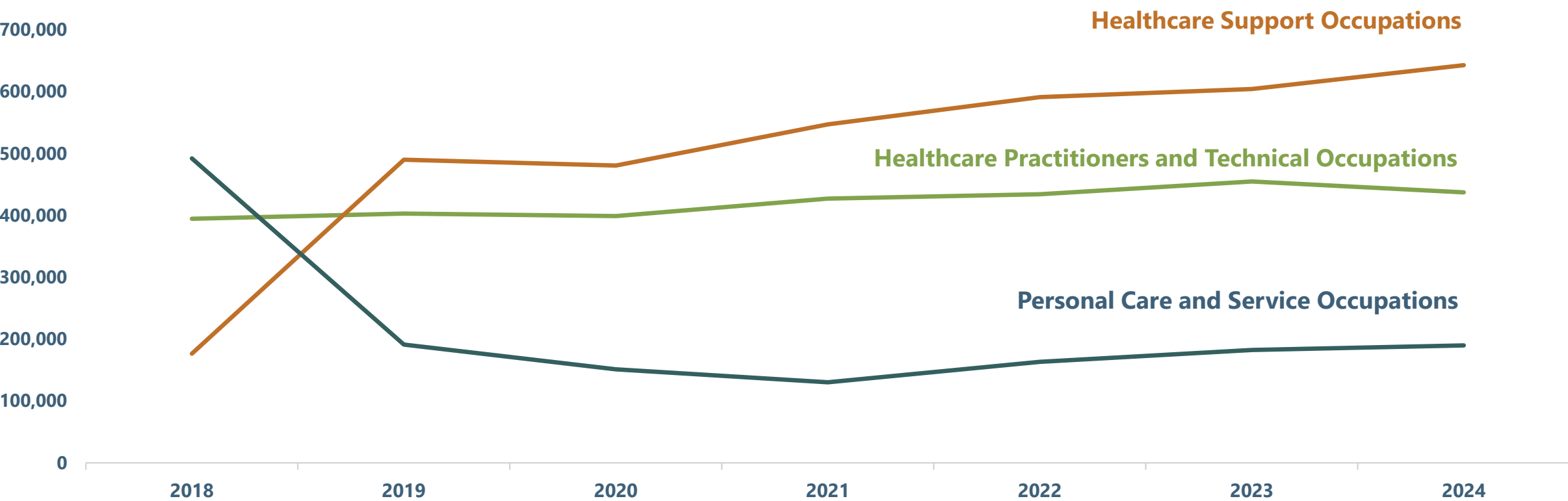
Beth Tamayose, Ph.D.
Research Director, University of California,
Riverside School of Public Policy

Healthcare vs. Healthcare Adjacent: Why NAICS 62 isn't the Full Picture



Employment Growth in the Healthcare Sector is Concentrated in Healthcare Support Occupations

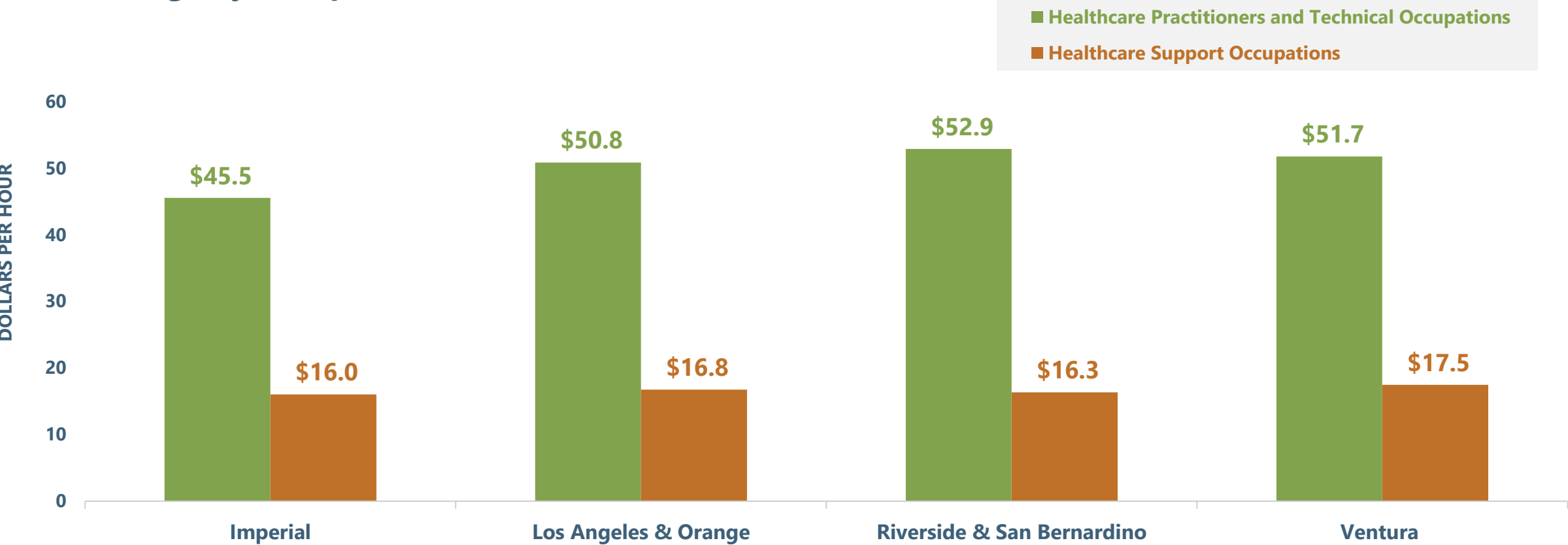
Employment in Healthcare-Related Occupations, SCAG Region



Source: Bureau of Labor Statistics Occupational Employment and Wage Statistics

Wide Pay Gap between Healthcare Occupations

Median Wage by Occupation, 2024



Source: Bureau of Labor Statistics Occupational Employment and Wage Statistics



Sustaining Olympic Benefits for LA and the SCAG Region

David Roland-Holst, Ph.D.
Managing Director, Berkeley Economic Advising and Research

The Next Gold Rush is Less than Three Years Away

- In 1848, James W. Marshall discovered a few grams of gold flakes in the sluice of his California sawmill.
- Nearly 200 years later, the Olympics will bring 200 kilos of gold medals to award the largest gathering of athletes in history.
- Like the original Gold Rush, these games will burnish the prospects of the of the Golden State economy.
- Can more sustainable Olympic investments secure economic and additional benefits for generations?



LA28 has Well-Established Sustainability Commitments

Both the International Olympic Committee and the local LA28 authorities have committed to eight categories of sustainability goals:

1. Climate-Positive Games
2. Zero New Permanent Venues
3. Sustainable Transportation
4. Waste Reduction and Zero Waste Goals
5. Water Conservation
6. Equity, Inclusion, and Social Sustainability
7. Transparency and Reporting
8. Legacy and Long-Term Impact



IMPACT & SUSTAINABILITY PLAN

July 2025

<https://tinyurl.com/y86bsc6h>



Very Laudable Goals, but How to Measure Progress?

- This multifaceted commitment touches on all the main aspects of sustainability, but
- The complexity of the Olympic development enterprise,
- In terms of interactions between public and private agency across so many local and regional activities,
- Will make it difficult to monitor progress and coordinate effort toward these shared objectives.
- Instead of another organizational mechanism to manage this, we recommend a single, simple Olympic Sustainability Scorecard.

Olympic Sustainability Scorecard

- An online digital visualization tool could inform the public in real time about the progress of leading LA28 activities toward advancing the United Nations Sustainable Development Goals (SDGs).
- Leveraging Los Angeles City's own innovative SDG initiative, such a tool could readily be extended across Southern California to support detailed sustainability assessment.
- A few examples follow. See <https://tinyurl.com/3u52m43k> for a more complete example evaluating LA City's Living Wage Ordinance.



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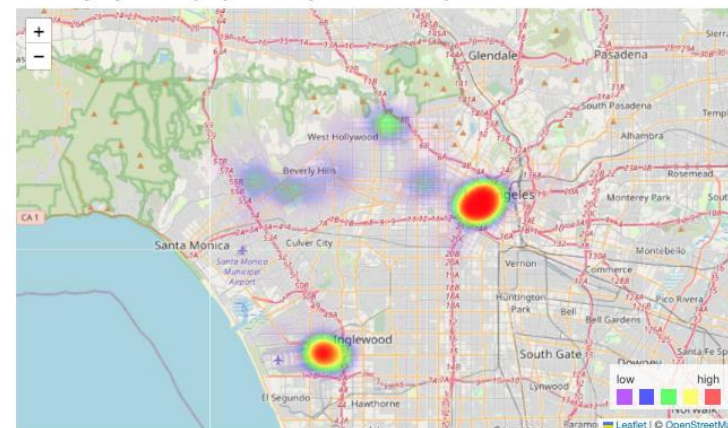
Example: Visualization of LA Minimum Wage Impacts

- In a separate project, we developed an interactive webpage illustrating spatial economic impacts of LA's new Living Wage Ordinance.
- Macroeconomic variables (e.g. jobs, wages, benefits) for individual occupations can be seen on a web map
- <https://tinyurl.com/3u52m43k>
- A map-based tool applied to LA28 & IOC sustainability goals elevates their stature and implementation.



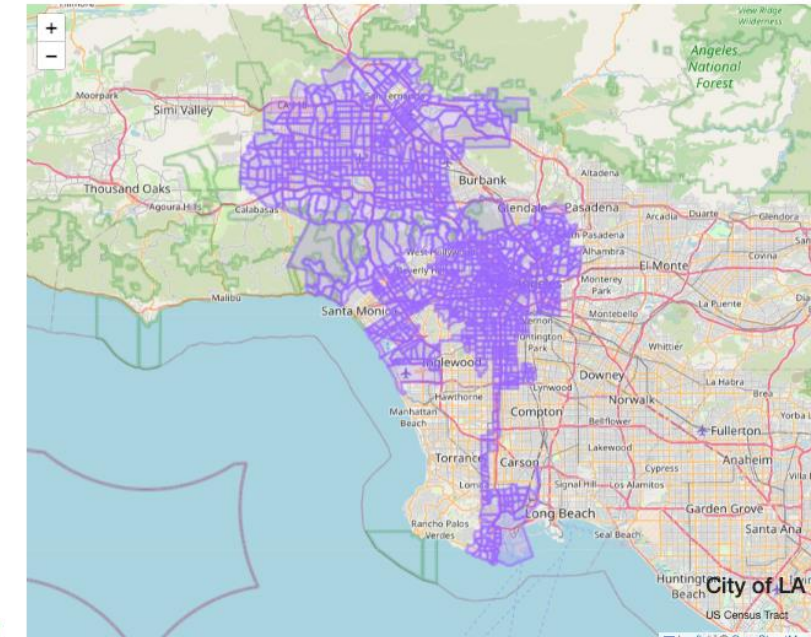
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Density by hotel (adjusted by room count)



City of Los Angeles Minimum Wage Study

The City of Los Angeles is the most populous city in California, with nearly 4 million residents. This makes Los Angeles the second-most populous city in the United States, only behind New York City. Los Angeles is comprised of 1102 unique US Census tracts.



Number of Hotel Workers Affected by Proposed Wage

Proposed minimum wage:



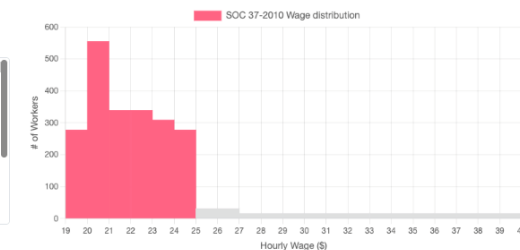
\$25

Number of workers affected:

2098

Occupations (SOC):

Building Cleaning Workers
Hotel, Motel, Resort Desk Clerks
Waiters and Waitresses
Maintenance & Repair Workers
Cooks
Dining Room, Cafeteria Attendants/Bartenders
Laundry and Dry-Cleaning Workers
First-Line Supervisors of Building & Grounds
Bartenders
Baggage Porters, Bellhops, Concierges
Dishwashers
Supervisors of Food Prep & Serving Workers
Cashiers
Hosts: Restaurant, Lounge, Coffee Shop
Food Servers, Nonrestaurant
Food and Beverage Managers





Panel Questions



Member Discussion

**We'd love to hear
from you. Take the
Attendee Survey.**



**Scan this QR code
to take the survey**

**Read the 2025 Southern
California Economic
Update Report.**



**Scan this QR code and read
the report at scag.ca.gov**