

2014  
**OTIS  
REPORT**  
ON THE  
**CREATIVE  
ECONOMY**

CALIFORNIA

Fast Facts

**CREATIVE INDUSTRY  
OUTPUT NEARLY**

**\$293.8  
Billion**  
(direct, indirect, induced)

**JOB IN CALIFORNIA**

**1,477,100**  
(direct, indirect, induced)

**NEARLY**  
1 in 10 Jobs

**LARGEST DIRECT  
JOB COUNTS IN  
CALIFORNIA BY  
SECTOR:**

Entertainment  
Publishing  
Fashion

**DIRECT EMPLOYMENT**

**694,900**  
in California's creative  
industries exceeded:

**COMPUTER/ELECTRONIC  
MANUFACTURING**  
(262,900)

**HOSPITAL WORKERS**  
(371,600)



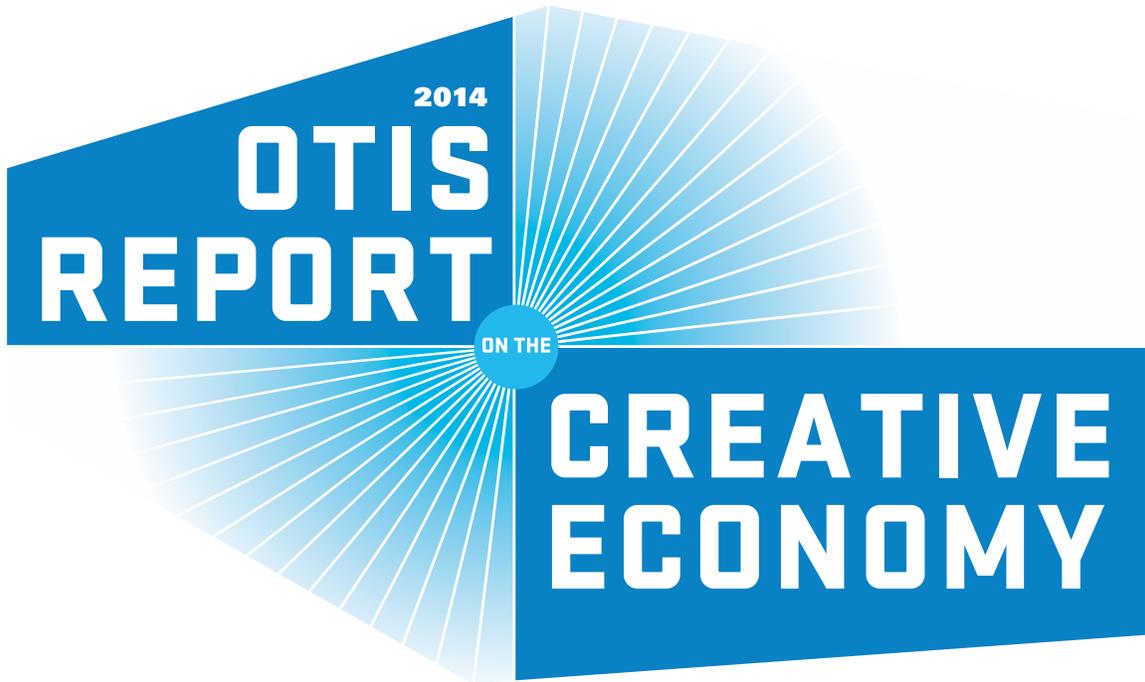
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# 2014 Otis Report on the Creative Economy of California



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



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Download the full report, view highlights from the creative economy launch event, and learn more about other resources at [www.otis.edu/otisreport](http://www.otis.edu/otisreport)

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**OTIS** Otis College of Art and Design

## What is the economic impact of creativity?

In 2007, President Samuel Hoi of Otis College of Art and Design set out to answer this question by commissioning the Los Angeles County Economic Development Corporation (LAEDC) to measure, benchmark, and assess trends in the creative economy of the Los Angeles region, which comprises L.A. and Orange Counties.

Beginning last year, with the generous support of the California Arts Council, the economic analysis was extended to the entire state of California, long recognized as a global magnet for creativity and innovation.

Today, the annual **Otis Report on the Creative Economy of the Los Angeles Region and California** is a leading advocacy tool for the arts, design, and entertainment and has stimulated similar efforts in cities and regions across the country. By capturing the size and role of the creative economy both regionally and statewide, the expanded **Otis Report** has also inspired a convergence of cross-sector leaders committed to working together toward the development of policies and the coordination of resources that will allow the creative economy to flourish.

The 2014 **Otis Report**, **based on data from 2013**, provides powerful and persuasive evidence of the enormous positive fiscal impact of the creative industries across California. Here are a few highlights of the 2014 **Otis Report** related specifically to the state as a whole:

- Creative industry output totaled **\$293.8 billion** (direct, indirect, and induced).
- The creative industries generated:
  - **1,447,100** jobs (direct, indirect, and induced), or nearly one in 10 of all wage and salary employment,
  - **\$113.5 billion** in total labor income, and
  - **\$12.1 billion** in taxes to California state and local governments.
- The largest direct job counts by creative sector in California were **entertainment** (164,000), **publishing and printing** (131,200), and **fashion** (120,100).
- Direct employment in California's creative industries (**694,900**) was more than two and a half times the number of workers that are employed by the computer and electronic manufacturing sector (262,900) and nearly twice the number who work in California's hospitals (371,600).

New to this year's report is the Location Quotient, a measure that seeks to quantify the concentration of a particular industry, industry cluster, occupation, or demographic group in a region compared to the nation. The Location Quotient reveals what makes a region unique and gives an indication of where a region has a competitive advantage. Amazingly, in 2013 in California, six out of ten occupations with the highest Location Quotients were all creative occupations: actors, media and communications workers, makeup artists, film and video editors, media and communications equipment workers, and agents and managers of artists, performers, and athletes.

If the original impulse of the **Otis Report** was to translate creativity into the hard-nosed language of dollars and cents, this year's report has come full circle with an attempt to tell the rich stories behind the statistics. To do this, Otis partnered with KCETLink and its award-winning Artbound series on a set of online articles and short video segments. The project culminated with "The State of Creativity: A Look into the **Otis Report on the Creative Economy**," a one-hour television special that premiered in Southern California on March 24th on KCET and nationally on March 30th at 8:00 pm on Link TV. The television special and accompanying articles and video segments now live on Artbound's website, at [www.kcet.org/arts/artbound](http://www.kcet.org/arts/artbound), with the goal of deepening engagement with the **Otis Report** and enhancing its ability to reach new audiences.

The **Otis Report** can leave no doubt that creativity is a powerful economic driver both regionally and statewide. KCETLink's compelling portrayal of the faces and facets of the creative economy make a persuasive case for the beneficial and essential role that creative enterprise plays in our lives: it is central to the health and well-being of our citizens and communities; it motivates innovation and ensures long-term regional competitiveness; and it creates jobs—numerous highly skilled jobs that require significant preparation (often a Bachelor's Degree or higher) to gain entry level employment.

Now more than ever, it is critical that leaders from the public, private, and nonprofit sectors work together to develop and sustain the talent pipeline that feeds the creative economy of our region. A necessary first step is investment in accessible, high-quality arts education, but championing policies and practices that encourage creative placemaking, entrepreneurship, and innovation are also required for growing the talent pipeline.

## ACKNOWLEDGMENTS

The 2014 **Otis Report on the Creative Economy** would not have been possible without the generous support of individuals and organizations that have joined together to affirm the value of the creative economy. On behalf of Otis College of Art and Design, I would like to express thanks to the Kyser Center for Economic Research at the Los Angeles County Economic Development Corporation for generating the **Otis Report**, and to KCETLink's Artbound for bringing it to life through print pieces, video segments, and the television special "The State of Creativity: A Look into the **Otis Report on the Creative Economy.**"

I would also like to thank our lead sponsors, the California Arts Council and Mattel, whose support of the **Otis Report** has been vital and steadfast. Their commitment, and the generous contributions of the following supporters, have made the 2014 **Otis Report** and its release events in Los Angeles and Orange County possible: the Boeing Company, the City of Los Angeles' Department of Cultural Affairs, City National Bank, Hybrid Apparel, the James Irvine Foundation, and Sony Pictures. Media partners for the events include KCETLink, Artbound, Arts for LA, Arts Orange County, Californians for the Arts, and LAX Coastal Chamber of Commerce.

I conclude with the hope that this year's transmedia presentation of the **Otis Report** inspires creative stakeholders to continue to work together to heighten awareness of the social, cultural, and economic impact of the serious business of creativity throughout California.

Kerry Walk, Ph.D.  
Interim President  
Otis College of Art and Design

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*Otis prepares diverse students of art and design to enrich our world through their creativity, their skill, and their vision. The College offers an interdisciplinary education for approximately 1,200 full-time students, awarding BFA degrees in Architecture/Landscape/Interiors, Communication Arts, Digital Media, Fashion Design, Fine Arts, Product Design, and Toy Design, and MFA degrees in Fine Arts, Graphic Design, Public Practice, and Writing. Through Continuing Education & Pre-College Programs, Otis offers a wide range of art and design courses and programs for all ages, including children and teens. For information, visit [www.otis.edu](http://www.otis.edu).*



**ECONOMIC CONTRIBUTION**

CALIFORNIA, 2013

**TOTAL GROSS STATE PRODUCT**  
**\$2.2 TRILLION**

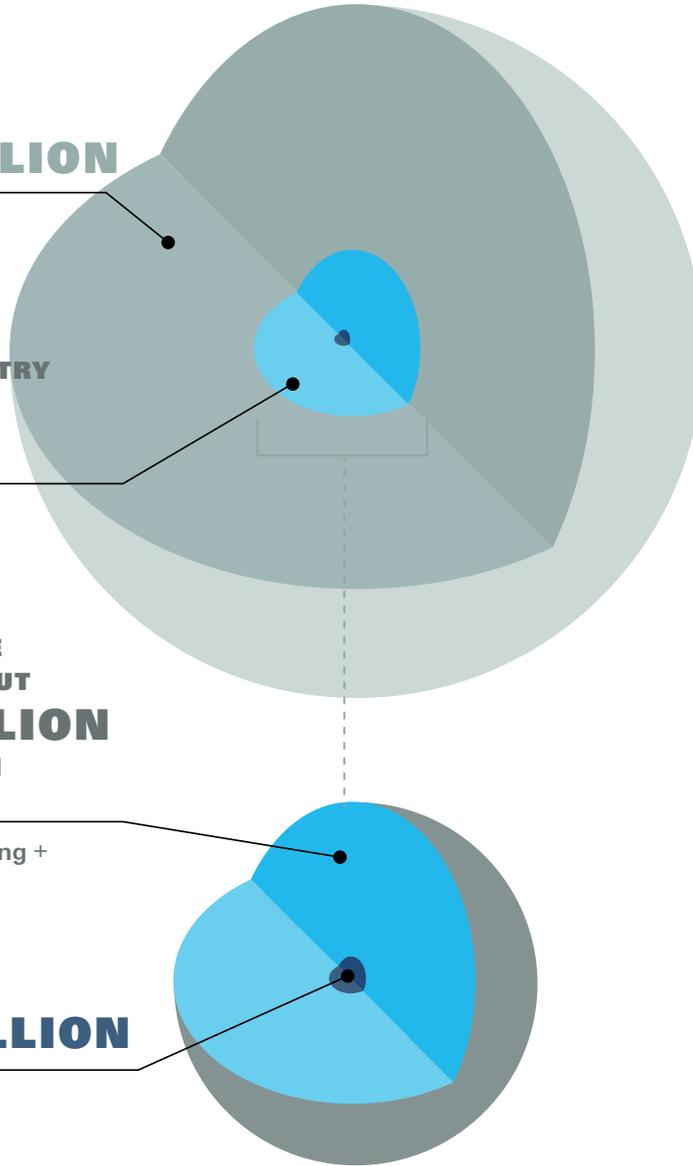
**CREATIVE INDUSTRY VALUE-ADDED CONTRIBUTION**  
**8.1%**

**TOTAL CREATIVE INDUSTRY OUTPUT**  
**\$294 BILLION**

Direct, indirect, and induced impact

Revenues + Spending + Economic Activity

Tax Revenues  
**\$12.1 BILLION**



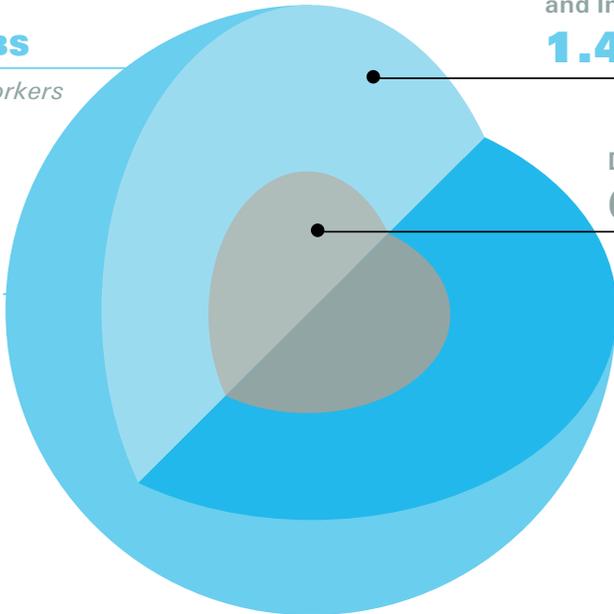


**EMPLOYMENT**  
CALIFORNIA, 2013

**NUMBER OF  
CREATIVE  
INDUSTRY JOBS**

*Wage and Salary Workers*

Creative Industry  
Jobs Account for  
**9.6%**  
of all workers  
in California



Direct, Indirect,  
and Induced Jobs  
**1.4 Million**

Direct Jobs  
**694,900**



# 2014 OTIS REPORT ON THE CREATIVE ECONOMY OF **CALIFORNIA**

### About the Kyser Center for Economic Research

The Kyser Center for Economic Research was named in November 2007 in honor of the LAEDC's first Chief Economist, Jack Kyser. The Kyser Center's economic research encompasses the Southern California region, which includes: the counties of Los Angeles, Orange, Riverside, San Bernardino, San Diego and Ventura. The center also tracks developments and produces forecasts, studies, and reports on the California, national and international economies.

The economy of the greater Los Angeles region is driven by more than its famed entertainment industry. The region's broad economic base also includes aerospace, automotive, biotechnology, fashion, manufacturing and international trade. The Kyser Center conducts research on the individual industries of the region to better understand ongoing changes in the economy.

The Kyser Center is highly regarded for its accurate and unbiased assessment of the economy. Kyser Center economists are also sought-after public speakers and frequent contributors to media coverage of the economy. At the heart of the Kyser Center is its mission to provide information, insights and perspectives to help business leaders, government officials and the general public understand and take advantage of emerging trends.

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Prepared for Otis College of Art and Design by the  
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# THE CREATIVE ECONOMY OF CALIFORNIA

**How is creativity defined?** One definition is that “creativity is the ability to produce something that is novel or original, and useful or adaptive.” This sounds simple enough but how is that “something” achieved? The creative spark is often depicted as an “aha” or “eureka” experience, when the reality may have been that years of thought, hard work and experimentation were needed to arrive at that one moment.<sup>1</sup> Researchers still cannot name the specific combination of biological and environmental factors that produce creative brains. Theories of the origin of human creativity are beyond the scope of this report, but if fostering creativity is to be considered as a means of economic development, then one must ask if creativity can be learned or taught, and if so, how it can then be nurtured.

<sup>1</sup> Andreasen, Nancy. “Secrets of the Creative Brain”, The Atlantic; Web. June 25, 2014

<sup>2</sup> Ibid

A second question is whether or not creativity in the arts can be equated with creativity in the sciences or in business, or should the latter two groups be considered separately? Is innovation in the sciences or business the same as artistic creativity or is it something altogether different? Research suggests that the process of creation (or innovation) in all three activities is largely the same: preparation, incubation, inspiration (the eureka moment) and production. The same, ongoing, iterative process is essential to many forms of creativity whether it be composing an orchestral work or revealing the structure of the universe.<sup>2</sup>

Creativity is one of California’s foremost economic assets and the **creative economy** is undeniably important to the region’s economic growth. In this report, the creative economy is defined as the businesses and individuals involved in producing cultural, artistic, and design goods and services. It consists of creative professions and enterprises that take powerful, original ideas and transform them into practical and often beautiful goods, or inspire us with their artistry.

It also includes organizations that provide a venue for artists to share their work with the public such as art galleries, festivals, museums, and theaters. Finally, the creative economy includes activities one does not instinctively associate with creativity such as apparel, toy and furniture manufacturing - all industries that depend on good design.

In a broader sense, the creative economy must include a support system that teaches, nurtures and sustains creative activity: arts programs in K-12 schools, post-secondary arts institutions to develop talent, and philanthropic foundations along with the other nonprofit funding organizations to provide financial resources, incentives, and services to the creative arts.

In today's economy, the market value of products and services is increasingly determined by a product's uniqueness, performance and aesthetic appeal. More companies are seeking employees with creativity as well as problem solving and communication skills. Business location decisions are also influenced by factors such as the availability of a creative workforce and the quality of life available to employees. The talent that drives the creative economy provides a competitive advantage that reaches across almost every industry in California.

Firms develop a competitive advantage when they implement strategies that other firms cannot duplicate. Regions acquire a competitive advantage when they attract creative employees because creative thinkers encourage innovation which fosters economic growth. Furthermore, the creative talent pool in a region is not as vulnerable to going "offshore". Historically, the development of advanced technologies that increased productivity was seen as a pathway to better jobs, but that is no longer necessarily true. Many advanced technologies can be replicated across the world using cheaper labor. But original artistic creation, innovative design and other higher-level creative work cannot be outsourced so easily. Creativity builds both brand awareness and attracts talented people to a dynamic environment. Moreover, cultural spaces can become hubs for civic engagement, often a powerful community revitalization asset, especially in economically distressed communities.

Because creativity is a dynamic function of humanity, the creative economy is a vibrant and vital force in society. Intellectual and aesthetic sensibilities lead individuals to express themselves through the arts, solve problems through design, and seek out what is beautiful and original. In many ways California is unique because of its combination of place, resources and open attitudes toward new ideas. This openness to new ideas and the ability to make associations and connections that other people do not see is one of the defining characteristics of creativity.

Here, new ideas are constantly given form and brought to life by creative people.

Otis College of Art and Design, a critical component of the creative economy, commissioned the analysis in this report to put real numbers to the business of creativity. Otis and the LAEDC carried out this research because in the state of California, creativity is fundamental to economic growth and prosperity.

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# NATIONAL AND GLOBAL ECONOMIC CONTEXT

While this report places the creative industries of California in the spotlight, the backdrop for these industries is the overall national and global economy. This section briefly summarizes recent and anticipated economic conditions.

As 2014 drew to a close, growth of U.S. gross domestic product (GDP) was expected to match the previous year's 2.2% rate. The U.S. economy should see continued forward progress in 2015 in both the public and private sectors. Even housing and construction, which came in below expectations in 2014, should move to higher levels in 2015.

GDP growth is expected to accelerate to 2.9% in 2015. The faster pace of economic growth will support continued job gains across most sectors of the economy, pushing the unemployment rate down to the natural rate of unemployment (i.e. full-employment) of roughly 5.5%. It should also be a year of stronger wage gains as the labor market tightens. Job gains and higher wages will support increases in consumer spending, which should reach near-trend growth of 2.7% in inflation-adjusted terms in 2015. Meanwhile, inflation itself, which has been tame over the past few years, is likely to stay in check going forward.

Business investment spending has grown consistently over the past five years, driven largely by spending on equipment, structures and intellectual property. Looking ahead to 2015, investment overall is expected to grow by 6.3% after a projected 5.8% gain in 2014.

California matched or exceeded the nation in terms of economic growth over most of the recovery period, enabling it to add jobs at a faster pace and recover from a more severe hit during the recession. With improvements across much of the state, California will outpace the nation's growth over the next five years, both in terms of real gross product, and wage and salary job growth. This will drive the state's unemployment rate down to long-run normal levels. Personal income, which has improved during the last several years, will grow more quickly going forward.

While modest steady growth is expected for the nation and California over the next year, there are risks to the forecast, primarily from elsewhere in the world. The nation's major trading partners across the Atlantic and the Pacific have struggled to ignite sustained growth within their economies. One could argue that policy missteps or omissions are to blame, but political developments in Ukraine, the Middle East, and elsewhere around the globe have increased both political and economic uncertainty, never friends of economic growth.

The global economy always faces risks associated with disruptions to the supply of energy, but these risks are low at this time. Energy price spikes pose less of a direct threat to the U.S. economy because of increases in domestic energy production. Even the indirect threat is reduced at this time because of the cooling effect on global energy prices of current economic weakness among U.S. trading partners.

---

## ECONOMIC CONTRIBUTION OF THE CREATIVE INDUSTRIES EMPLOYMENT

A total of 694,900 wage and salary workers in California were employed directly in the creative industries in 2013. By sector, the largest employment counts were in entertainment (164,000 jobs); publishing and printing (131,200 jobs); and fashion (120,100 jobs). Together, these three industries accounted for nearly 60 percent of direct creative industries employment in California.

While the direct job counts are impressive, they are only one part of a much larger employment picture. Direct employees are those who actually work in the creative industries of California. Indirect jobs are created when firms in these industries make purchases from their suppliers and vendors. Additional induced jobs are generated when the direct and indirect employees spend their wages on consumer goods and services. In that sense, every job across the creative sector supports or sustains other jobs in the state.

Direct employment in California's creative industries (694,900) was more than two and half times the number of workers that are employed by the computer and electronic manufacturing sector (262,900) and nearly twice the number who work in California's hospitals (371,600).

**Source:**  
California Employment Development Department, Labor Market Information Division.

Direct, indirect and induced employment in the creative industries of California totaled over 1.4 million jobs in 2013. The ripple effect is substantial, giving rise to job gains and increases in incomes in a wide range of industries across the state's economy.

TABLE 1:  
Employment Impact of the  
Creative Industries, 2013

<b>DIRECT JOBS</b>	<b>INDIRECT &amp; INDUCED JOBS</b>	<b>TOTAL JOBS</b>
694,900	752,200	1,447,100

## LABOR INCOME

Total direct labor income in the creative industries of California amounted to \$71.4 billion in 2013. Examining the distribution of labor income across the creative economy provides a sense of how individual creative industries compare in size and economic contribution.

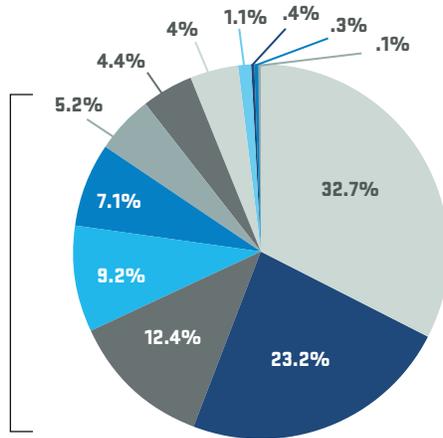
At \$23.4 billion, the publishing and printing sector contributed the largest share (32.7%) to total creative industry payrolls in California. Entertainment was second with \$16.6 billion or 23.2%, followed by digital media at \$8.8 billion (12.4%).

Although labor income earned by individuals directly employed in the creative industries of California was \$71.4 billion, the total combined effect of adding indirect and induced workers brought that figure up to \$113.5 billion.

## DIRECT LABOR INCOME OF THE CREATIVE INDUSTRIES IN CALIFORNIA, 2013

CALIFORNIA  
DIRECT LABOR INCOME  
**\$71.4 Billion**

Source: California EDD,  
QCEW data



- 32.7%** Publishing & Printing
- 23.2%** Entertainment
- 12.4%** Digital Media
- 9.2%** Visual & Performing Arts
- 7.1%** Fashion
- 5.2%** Communication Arts
- 4.4%** Furniture & Decorative Arts
- 4%** Architecture & Interior Design
- 1.1%** Toys
- 0.4%** Performing Arts Schools
- 0.3%** Product & Industrial Design
- 0.1%** Art Galleries

See the [Industry Snapshots](#) section of this report for the direct, indirect and induced labor income effects of individual industry sectors.

## TAX EFFECTS

Activity in the creative sectors triggers jobs and spending, but it also results in tax revenues for state and local government. 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 California, property taxes, state and local personal income, and sales taxes generated directly and indirectly by creative industries were nearly \$12.1 billion in 2013. By sector, publishing and printing generated tax revenues of \$2.5 billion, followed by fashion at \$2.4 billion and entertainment at \$2.3 billion.

## ECONOMIC CONTRIBUTION SUMMARY

Table 2 summarizes the total economic contribution of California's creative industries in 2013. The creative industries generated \$293.8 billion in direct, indirect, and induced output. They employed over 1.4 million wage and salary workers who earned total income of \$113.5 billion. The nonemployer establishments are excluded from the contribution analysis (direct, indirect and induced) in part because they are from a different year, and also to avoid double counting (an individual may do both contract work and be on a company payroll). However this figure shows that significant numbers of workers are employed as freelance/contingent workers over and above the wage and salary jobs that are a part of the formal contribution analysis.

Direct, indirect and induced workers paid \$12.1 billion in taxes to California state and local governments. Of the \$293.8 billion in total creative industries output, \$179.0 billion was value-added (labor income and profits) generated by the creative industries in excess of materials and services purchases. This net economic contribution of \$179.0 billion was the equivalent of 8.1% of the region's gross product of \$2.2 trillion in 2013.<sup>3</sup>

<sup>3</sup> The contribution of the creative industries to California's economy increased over the year. In 2012, the creative industries value-added was \$155 billion, which equated to 7.8% of California's gross product of \$2.0 trillion.

TABLE 2:  
Economic Contribution of the Creative Industries, 2013

DIRECT IMPACT	TOTAL IMPACT
JOBS: <b>694,900</b>	DIRECT & INDIRECT JOBS: <b>1,447,100</b>
NONEMPLOYER ESTABLISHMENTS (most current data from tax year 2012, IRS): <b>316,383</b>	OUTPUT: <b>\$293.8</b> Billion
LABOR INCOME: <b>\$71.4</b> Billion	LABOR INCOME: <b>\$113.5</b> Billion
	TAXES: <b>\$12.1</b> Billion

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# EMPLOYMENT TRENDS

Direct employment in California's creative industries peaked in 2006, contracted sharply during the recession and continued to fall during the early years of the recovery. Five years have elapsed since the end of the recession, and while job counts have improved, employment in the creative industries has yet to fully recover. This pattern has not been confined to the creative industries, but is also true of total payroll employment in the state. The five-year comparisons (2008-2013), which are the focus of this report, encompass the full employment effects of the recession that occurred from 2008 to 2010. However, the creative industries took a bigger hit relative to the economy as a whole. Between 2008 and 2013, California suffered a loss of 58,400 jobs in the creative industries, a decline of 7.8%. By comparison, the total number of nonfarm jobs across all industries in the state fell by just 0.6%.

Although the recession and slow recovery accounts for much of the decline in jobs over the last five years, the larger drop in creative industries employment relative to the overall economy can be explained in large part by the disproportionate share of manufacturing jobs that are included in the creative economy. In 2013, manufacturing jobs were 8.3% of total nonfarm employment in California. Between 2008 and 2013, job counts in the state's overall manufacturing sector declined by 12.2%. In contrast, manufacturing jobs in the creative industries comprised 24.6% of creative sector employment. The decline in creative sector manufacturing jobs over that same five year period was 22.3%. The greater decline in creative sector manufacturing stems from the fact that production jobs in apparel and furniture manufacturing continued to be outsourced to lower-cost countries.

Some of these manufacturing jobs may return as the economy reverts to full employment, but there are other factors in addition to outsourcing that have contributed to manufacturing job declines. Over the past three decades, technological change and increased worker productivity have played a significant role in this process. This is particularly true of the publishing and printing industry which has undergone a transformative technological change over the last decade. As a result, manufacturing is not dead in California (or the United States), but by virtue of advanced technologies and greater efficiencies, manufacturers have been able to expand output using fewer workers.

Within the creative sector, however, manufacturing's share of direct employment in California has declined. In 2002, manufacturing's share of creative industry employment was 37.2%. By 2008, the share dropped to 27.4% and bottomed out at 24.6% in 2013. At the same time, the share of services employment: design, retail, and wholesale, has been on the rise but the increase has not been fast enough to fully compensate for the lost manufacturing jobs. Still, service sector jobs are much harder to outsource, particularly design work. Many U.S. firms choose to maintain domestic design and/or research and development facilities in the U.S. precisely because these are high value-added activities, less easily replicated elsewhere.

While there was a decline in total creative industry jobs between 2008 and 2013, employment for most creative sectors bottomed out in 2010 and has since been on the rise. Three sectors weathered the recession relatively well and added to payrolls between 2008 and 2013. Visual and performing arts increased payroll employment by 2,300 jobs (up by 4.4%); employment at fine and performing arts schools grew by 1,500 jobs (16.9%); and employment in digital media shot up by 10,200 jobs (23.6%).

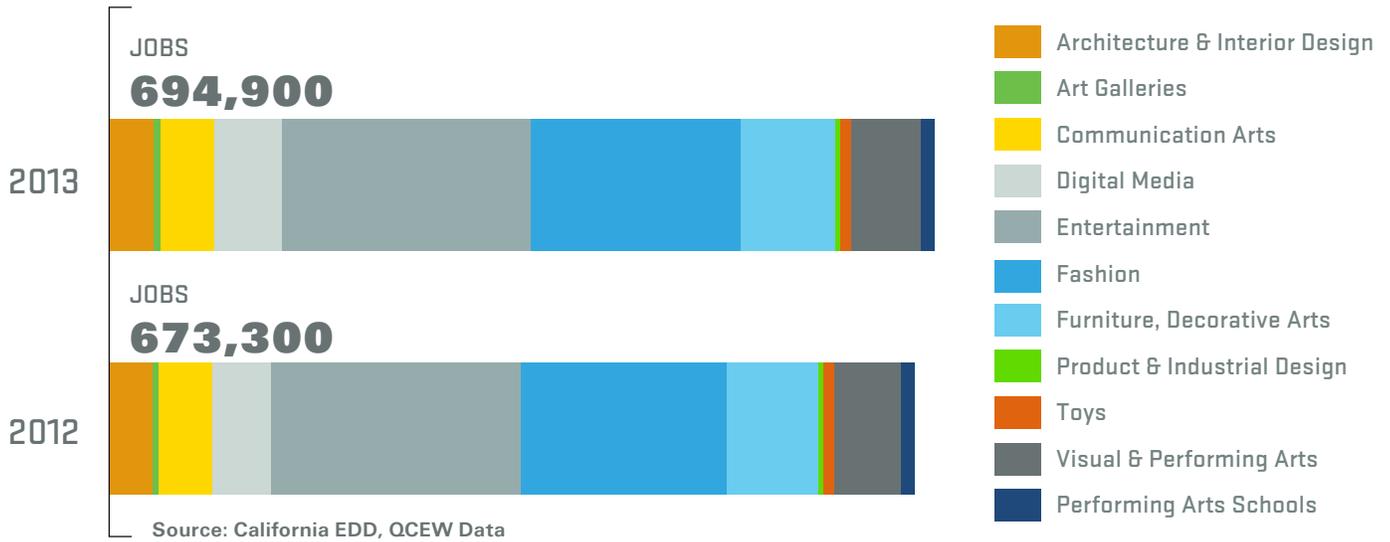
Turning to more recent trends, creative industry employment in California increased by 3.2% or 21,600 jobs from 2012 to 2013. This was slightly ahead of total wage and salary employment growth of 3.0%.

The largest component of the creative economy in California is the entertainment industry which is concentrated in Los Angeles County. In 2013, there were 164,000 entertainment-related jobs in California, down from 179,500 in 2008. Within the entertainment sector, motion picture and video production experienced the largest drop in employment between 2008 and 2013 – 8,600 jobs were lost, a decline of 7.3%.<sup>4</sup> Cable broadcasting employment also contracted sharply. Employment fell by 6,100 jobs or 30.9% - a reflection of the structural changes underway in the cable broadcasting industry. In 2013, entertainment jobs counts were down over the year (-0.6%) due to declines in post-production services, sound recording, radio stations and cable broadcasting.

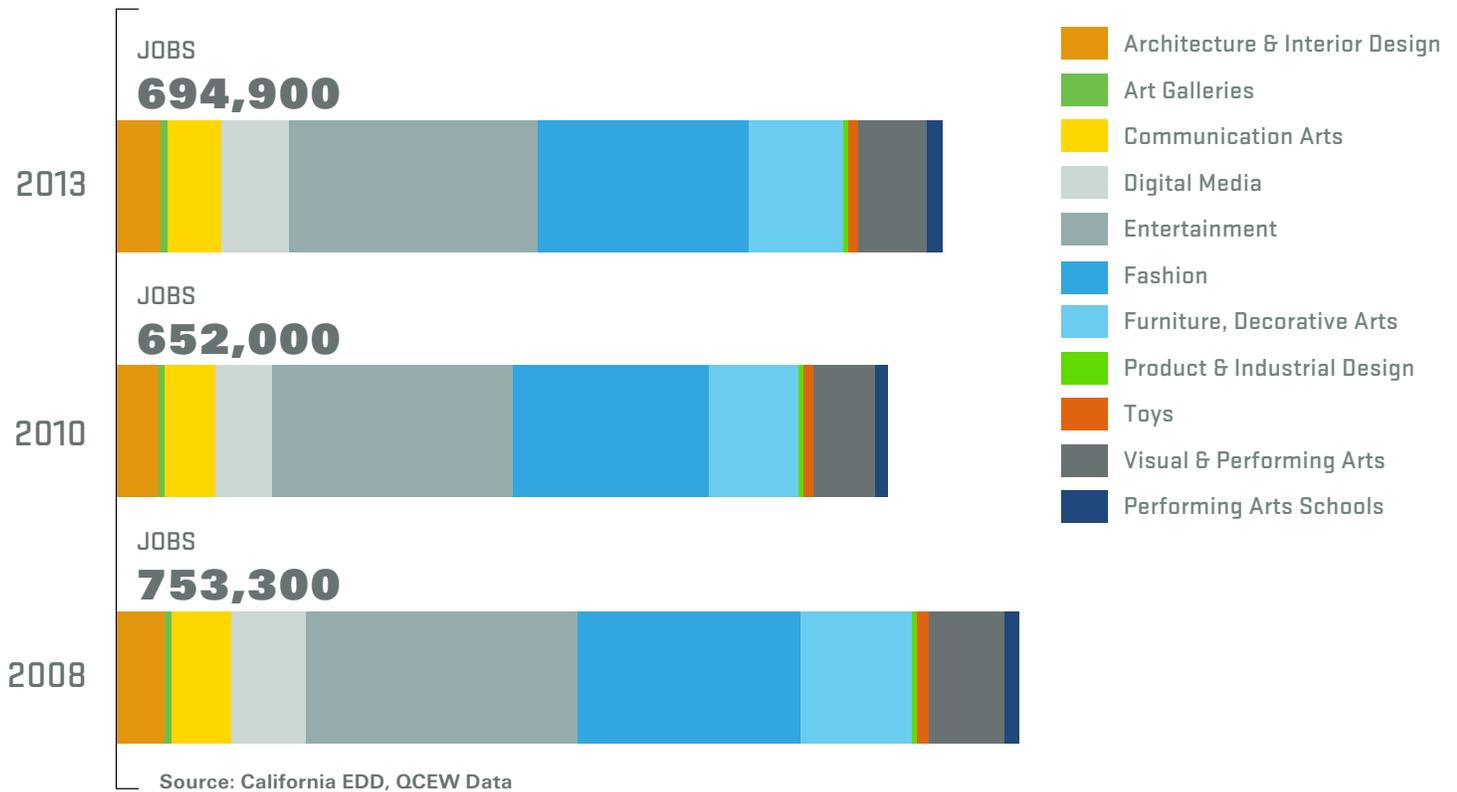
<sup>4</sup> This trend actually reversed in 2013 and continued into 2014, with annual employment expected to hit prerecession levels this year (2014) or next.

Looking at the remaining creative industry sectors, entertainment was the exception in 2013. Every other creative industry posted an increase in employment. The fastest growing was product and industrial design (12.9%); followed by publishing and printing (8.0%, primarily due to a surge in internet publishing employment); and digital media (4.5%). See [Table 11](#) and [Table 12](#) in the Appendix for additional details.

## JOB TRENDS IN THE CREATIVE INDUSTRIES CALIFORNIA, 2012-2013



## JOB TRENDS IN THE CREATIVE INDUSTRIES CALIFORNIA, 2008-2013



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# COUNTING THE SELF-EMPLOYED

A large and growing number of creative people are self-employed. Although their contribution to the creative economy is significant, their activities are not captured in the federal and state employment data used to develop most of the job numbers in this report. The government does collect data separately 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 come from the IRS for tax year 2012. It is important to note that some individuals may work on the payroll for an employer and be self-employed as well.

In 2012, there were 316,383 nonemployer firms in the creative industries in California. Similar to trends in payroll employment, the number of self-employed individuals fell during 2008 and 2009, but turned around in 2010 and surpassed the prerecession peak within the year. Nonemployer firms grew by 8.5% (24,919 firms) between 2007 and 2012, slightly faster than the 6.1% increase recorded for self-employed individuals across all industries in California.

Visual and performing arts providers made up the largest sector of nonemployer firms, particularly the subset of independent artists, writers and performers. Many of these people are involved in the entertainment industry as actors, screen writers, musicians and other specialty occupations. A large number of independents also appear in the communication arts sector as freelance graphic artists, or as commercial or portrait photographers.

Revenues and receipts of creative nonemployer firms in California were \$12.6 billion in 2012, with 32 percent of that total generated by independent artists, writers and performers. Revenues in 2012 were up by 4.1% compared with 2007. In spite of the increase in the number of firms between 2007 and 2012, and the uptick in total revenues, there were several nonemployer sectors that saw significant declines in revenues (and employment). Notable was the drop in revenues for architecture and interior design, and furniture and the decorative arts, reflecting the housing downturn and subsequent slow recovery. Revenues in the publishing and printing sector also declined sharply, mostly the result of technological change and a restructuring of the industry.

The concentration of these single-person firms varies a great deal across different sectors of the creative economy. In the visual and performing arts, there were nearly three self-employed individuals in the state for every salaried worker. The communication arts also have a high ratio of self-employed workers relative to salaried employees. In 2012, there were 1.9 self-employed persons in California for every salaried employee.

Growth rates of creative non-employer firms versus payroll employment also differ considerably by industry sector. The fact that nonemployer firm growth continues to outpace wage and salary employment points to the increasing importance of self-employed individuals to the creative economy. One reason is that many jobs lost during the recession did not return during the recovery. This prompted some laid-off workers to start their own businesses as independent contractors. This is partly a cyclical effect that may gradually reverse itself now that job creation is proceeding at a healthier rate.

There is also a structural component affecting the growth of nonemployer firms in the creative industries. Competitive pressures stemming from globalization continue to exert enormous pressure on firms to cut costs. This has led to companies seeking efficiencies by using more part-time and temporary labor, and outsourcing non-core tasks to independent contractors. Technological innovation has also played a role by enabling individuals to increase their productivity in ways that were unimaginable just a few years ago. This has allowed more creative people to strike out on their own as a matter of preference.

**TABLE 3:**  
**Ratio of Self-Employed Individuals to Salaried Employees by Sector, 2012**

Industry Sector	Nonemployers	Employees	Ratio
Architecture & Interior Design	17,406	36,700	0.47
Art Galleries	2,373	2,200	1.08
Communication Arts	81,391	43,400	1.88
Digital Media	---	51,200	---
Entertainment	30,152	165,000	0.18
Fashion	14,397	116,700	0.12
Furniture & Decorative Arts	5,084	65,800	0.08
Product & Industrial Design	---	1,900	---
Publishing & Printing	15,682	121,400	0.13
Toys	1,154	7,100	0.16
Visual & Performing Arts	148,744	52,100	2.85

**Source:** California EDD QCEW data; Bureau of the Census Nonemployer Statistics

**Note:** Nonemployer data are not available for Digital Media and Product & Industrial Design

**TABLE 4:**  
**Comparative Growth Rates of Salaried Employees to Self-Employed Individuals, 2012**

Industry Sector	Nonemployer Growth 2007-2012	Employment Growth 2007-2012
Architecture & Interior Design	-2.3%	-29.8%
Art Galleries	-6.3%	-47.8%
Communication Arts	13.2%	-7.1%
Digital Media	---	19.2%
Entertainment	11.1%	-7.1%
Fashion	4.5%	-15.6%
Furniture & Decorative Arts	-11.4%	-33.1%
Product & Industrial Design	---	-33.8%
Publishing & Printing	-2.6%	-9.3%
Toys	-2.6%	-27.9%
Visual & Performing Arts	10.0%	0.8%
<b>Total Employment Growth:</b>	<b>8.5%</b>	<b>-12.1%</b>

**Source:** California EDD QCEW data; Bureau of the Census Nonemployer Statistics

**Note:** Nonemployer data are not available for Digital Media and Product & Industrial Design

**TABLE 5:**  
**Number of Nonemployer Firms**  
**for the Creative Industries, 2007–2012**

Creative Industry	NAICS Code	Number of Firms						Value of Receipts (\$millions)						
		2007	2008	2009	2010	2011	2012	2006	2007	2008	2009	2010	2011	2012
<b>Architecture and Interior Design:</b>		<b>17,810</b>	<b>17,085</b>	<b>16,628</b>	<b>17,093</b>	<b>17,476</b>	<b>17,406</b>	<b>\$955.3</b>	<b>\$943.4</b>	<b>\$831.5</b>	<b>\$675.1</b>	<b>\$689.5</b>	<b>\$719.9</b>	<b>\$752.4</b>
<i>Architectural Services</i>	54131	9,077	8,643	8,606	8,905	9,052	9,076	628.4	613.7	534.7	436.9	444.1	463.2	481.1
<i>Drafting Services</i>	54134	4,500	4,229	3,730	3,685	3,712	3,674	141.4	139.3	119.6	87.3	89.9	96.0	101.5
<i>Landscape Design</i>	54132	4,233	4,213	4,292	4,503	4,712	4,656	185.5	190.3	177.2	150.9	155.5	160.7	169.8
<b>Art Galleries</b>	45392	<b>2,533</b>	<b>2,377</b>	<b>2,311</b>	<b>2,265</b>	<b>2,295</b>	<b>2,373</b>	<b>\$196.6</b>	<b>\$198.0</b>	<b>\$165.0</b>	<b>\$122.7</b>	<b>\$128.4</b>	<b>\$146.7</b>	<b>\$149.8</b>
<b>Communication Arts:</b>		<b>39,193</b>	<b>39,338</b>	<b>40,557</b>	<b>42,773</b>	<b>44,510</b>	<b>81,391</b>	<b>\$1808.4</b>	<b>\$1848.2</b>	<b>\$1796.1</b>	<b>\$1606.4</b>	<b>\$1753.8</b>	<b>\$1850.4</b>	<b>\$3324.8</b>
<i>Specialized Design Services</i>	5414	3,559	3,503	3,475	3,652	3,647	38,772	173.2	184.5	160.7	133.8	140.5	148.9	1508.1
<i>Advertising Agencies</i>	5418	19,085	19,102	19,995	20,960	21,604	22,718	1137.9	1139.5	1132.0	1024.9	1130.6	1184.0	1262.1
<i>Photographic Services</i>	54192	16,549	16,733	17,087	18,161	19,259	19,901	497.2	524.2	503.5	447.6	482.7	517.4	554.5
<b>Entertainment:</b>		<b>27,129</b>	<b>27,123</b>	<b>26,407</b>	<b>27,305</b>	<b>28,437</b>	<b>30,152</b>	<b>\$1148.7</b>	<b>\$1182.7</b>	<b>\$1199.2</b>	<b>\$1103.5</b>	<b>\$1153.4</b>	<b>\$1234.6</b>	<b>\$1321.0</b>
<i>Motion Picture/Video Production</i>	5121	20,370	20,378	19,762	20,628	21,610	22,955	892.8	923.5	936.3	875.9	914.4	980.3	1052.2
<i>Sound Recording</i>	5122	4,426	4,438	4,416	4,461	4,631	4,913	158.2	163.7	171.9	148.7	151.4	163.9	175.7
<i>Broadcasting (except Internet)</i>	515	2,333	2,307	2,229	2,216	2,196	2,284	97.7	95.6	91.0	79.0	87.5	90.5	93.1
<b>Fashion:</b>		<b>13,436</b>	<b>12,927</b>	<b>12,951</b>	<b>13,110</b>	<b>13,617</b>	<b>14,397</b>	<b>\$1155.5</b>	<b>\$1126.1</b>	<b>\$1096.3</b>	<b>\$999.6</b>	<b>\$1060.2</b>	<b>\$1146.5</b>	<b>\$1144.9</b>
<i>Textile Mills Manufacturing</i>	313	234	215	209	236	236	292	3.9	5.4	5.1	6.0	6.4	8.9	10.4
<i>Apparel Manufacturing</i>	315	4,712	4,476	4,448	4,428	4,554	4,713	215.3	225.4	211.6	200.5	212.7	212.4	211.3
<i>Apparel Wholesaling</i>	4243	4,828	4,665	4,665	4,722	4,908	5,021	533.9	500.6	488.0	448.4	478.1	522.6	511.7
<i>Footwear Manufacturing</i>	3162	128	117	118	107	108	140	6.3	5.1	6.3	6.3	5.9	5.6	6.7
<i>Other Leather and Allied Products Mfg.</i>	31699	20	15	17	13	19	384	1.8	1.5	.9	.5	.8	.8	14.7
<i>Jewelry Wholesaling</i>	42394	3,514	3,439	3,494	3,604	3,792	3,847	394.3	388.1	384.4	337.9	356.3	396.2	390.1
<b>Furniture and Decorative Arts:</b>		<b>5,295</b>	<b>4,768</b>	<b>4,655</b>	<b>4,615</b>	<b>4,576</b>	<b>5,084</b>	<b>\$400.7</b>	<b>\$414.2</b>	<b>\$345.2</b>	<b>\$299.1</b>	<b>\$302.2</b>	<b>\$315.9</b>	<b>\$344.8</b>
<i>Textile Product Mills</i>	314	410	368	355	343	335	413	13.6	17.3	15.1	18.2	17.6	15.9	16.0
<i>Furniture Manufacturing</i>	337	2,411	2,231	2,198	2,229	2,189	2,202	157.5	161.7	134.9	120.2	121.0	127.9	127.6
<i>Furniture Wholesaling</i>	4232	2,223	1,921	1,869	1,802	1,784	1,789	213.3	215.8	179.4	150.7	151.3	157.4	166.6
<i>Glass &amp; Glass Products Mfg.</i>	32721	26	23	25	23	33	445	1.1	2.4	2.3	.8	.8	1.5	20.2
<i>Other Misc. Nonmetallic Mineral Product Mfg.</i>	3279	225	225	208	218	235	235	15.1	16.9	13.4	9.1	11.5	13.2	14.3
<b>Toys:</b>		<b>1,185</b>	<b>1,097</b>	<b>1,073</b>	<b>1,039</b>	<b>1,112</b>	<b>1,154</b>	<b>\$90.3</b>	<b>\$90.8</b>	<b>\$79.1</b>	<b>\$68.9</b>	<b>\$73.6</b>	<b>\$78.6</b>	<b>\$77.8</b>
<i>Toy Wholesaling</i>	42392	1,185	1,097	1,073	1,039	1,112	1,154	90.3	90.8	79.1	68.9	73.6	78.6	77.8
<b>Visual and Performing Arts Providers:</b>		<b>135,276</b>	<b>134,245</b>	<b>132,904</b>	<b>138,100</b>	<b>143,957</b>	<b>148,744</b>	<b>\$3796.1</b>	<b>\$4159.3</b>	<b>\$4210.5</b>	<b>\$3995.2</b>	<b>\$4179.0</b>	<b>\$4465.6</b>	<b>\$4825.2</b>
<i>Performing Arts Cos.</i>	7111	7,378	7,593	8,041	8,475	8,812	9,429	240.2	288.0	289.1	273.7	294.9	300.6	332.8
<i>Agents &amp; Managers of Artists, etc.</i>	71141	7,011	6,920	6,942	7,387	7,793	8,028	351.3	360.8	364.4	337.9	351.9	385.6	402.6
<i>Independent Artists, Writers, etc.</i>	71151	120,117	119,003	117,255	121,627	126,715	130,550	3190.2	3495.6	3542.5	3369.6	3518.7	3765.6	4073.2
<i>Museums</i>	7121	770	729	666	611	637	737	14.4	14.9	14.5	14.0	13.5	13.80	16.63
<b>Publishing and Printing:</b>		<b>5,760</b>	<b>5,420</b>	<b>5,439</b>	<b>5,383</b>	<b>5,416</b>	<b>15,682</b>	<b>\$336.9</b>	<b>\$340.6</b>	<b>\$302.1</b>	<b>\$270.3</b>	<b>\$291.6</b>	<b>\$297.9</b>	<b>\$672.0</b>
<i>Printing &amp; related Support Activities</i>	3231	4,805	4,509	4,555	4,507	4,498	4,521	291.5	299.1	261.7	236.7	256.7	263.5	263.8
<i>Book, Periodical, Newspaper Wholesalers</i>	42492	99	92	83	72	70	1,097	4.5	5.1	4.4	3.1	3.5	3.9	47.2
<i>Publishing Industries (except Internet)</i>	511	856	819	801	804	848	10,064	40.9	36.3	36.0	30.4	31.4	30.5	361.0
<b>Total Nonemployer Firms:</b>		<b>247,617</b>	<b>244,380</b>	<b>242,925</b>	<b>251,683</b>	<b>261,396</b>	<b>316,383</b>	<b>\$9,888.3</b>	<b>\$10,303.2</b>	<b>\$10,024.9</b>	<b>\$9,140.8</b>	<b>\$9,631.7</b>	<b>\$10,256.2</b>	<b>\$12,612.6</b>

Source: Bureau of the Census, Nonemployer Statistics

Note: Nonemployer data are not available for Digital Media and Product & Industrial Design

# OCCUPATIONS IN THE CREATIVE ECONOMY EMPLOYMENT

There are two ways to think about creative employment: individuals who work in a creative industry or individuals working in creative occupations. Up to this point this report has concentrated on the creative **industries**. These are firms (commercial and nonprofit) that produce and distribute cultural, consumer and commercial goods and services.

This section turns from industry analysis to the study of **occupations**. Many of these creative occupations may be found within the set of creative industries, but they are also present in significant numbers in the broader set of industries outside the creative sector. Data on occupations from the U.S. Bureau of Labor Statistics makes it possible to identify and measure creative occupations within the creative industries and in the rest of the economy. It can also shed light on the extent to which creative industries employ people in functions outside of creative occupations.<sup>5</sup>

Unlike industry-based definitions of the creative economy, there is greater consensus among researchers regarding creative occupations. The occupational data used in this report are based on the Standard Occupational Classification (SOC) system. Of the 840 detailed occupational codes listed in the SOC system, 833 were included in the data set for California, and of those, 80 have been identified as “creative”.

These 80 creative occupations can be found across a wide array of organizational functions. For example, within the management strata, creative occupations include advertising, marketing and public relations managers. In technical fields, there are software developers and architects, and in production-related occupations, there are tailors, cabinet makers and engravers. It is easy to imagine that a marketing manager could be working in any number of industries, creative or otherwise, as could a graphic designer. This illustrates the fact that creative occupations may often be found outside the creative sectors of the economy.

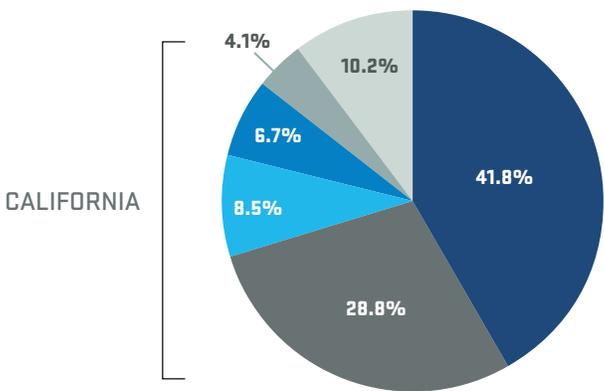
In 2013, there were 606,720 workers in California employed in a creative occupation. This represents 4.1% of total private occupation-based employment in the state. In contrast to employment trends by industry, creative employment measured by occupation increased between 2008 and 2013 by 37.3% or 164,860 jobs. Breaking down employment by major occupational category: (see chart below)

<sup>5</sup> “Employees” are all part-time and full-time workers who are paid a wage or salary. The survey does not cover the self-employed, owners and partners in unincorporated firms, household workers, or unpaid family workers.

- There were 253,610 individuals employed in occupations related to art, design, entertainment or media, representing about 42% of the total.
- The next largest category by employment was computer and mathematical occupations with 174,500 workers, or 29% of the total. Many of these workers spend their days creating animated characters for film and TV, and designing video games (although, given the current occupational classification system, it is very difficult to isolate game design employment).
- The third largest category was education, training and library occupations with 51,490 workers or 8.5% of the total. Unfortunately, arts, cultural and creative activity within California's colleges and universities is also difficult to fully measure since employment data for campus museums, theaters, and literary publications is not disaggregated.

That numerous creative occupation may be found across so many industries suggests the potential for large spillover effects from creative industries and occupations to other industries within California's economy. It also implies that it is in the state's economic interest to maintain, nurture and grow its deep pool of creative talent.

### DISTRIBUTION OF CREATIVE OCCUPATIONS BY MAJOR CATEGORIES



SOURCE:  
Bureau of Labor Statistics,  
Occupational Employment  
Statistics

- 41.8%** Art, Design, Entertainment, and Media
- 28.8%** Computer or Mathematical
- 8.5%** Education, Training and Library
- 6.7%** Management
- 4.1%** Architecture and Engineering
- 10.2%** All Others

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# HOW MUCH DO CREATIVE WORKERS EARN?

Creativity is a highly valued and recognized professional attribute. Along with the ability to collaborate with co-workers and to communicate effectively, creativity is one of the most sought-after qualities in a prospective employee. The salaries received by many creative individuals working in a creative occupation in California bear this out.

In California in 2013, the creative occupation earning the highest annual median wage (see end note) was marketing managers at \$142,850. The lowest was \$20,360 for motion picture projectionists, which is an occupation likely to employ mostly part-time workers. The median wage across occupations in California was \$38,920 in 2013. Out of the 80 creative occupations analyzed in this report, only 17 had a median annual wage less than the state-wide median. One reason for the relatively higher salaries found within the creative occupations is that many require higher levels of education. Of the 80 creative occupations described in this report, 38 require a bachelor's degree or higher. (see pie chart on the next page)

The occupations in [Table 6](#) on page 33 were selected because they align closely with the creative industries. Between 2012 and 2013, there was a great deal of variation in the median annual wage, with eight out of the thirteen selected occupations posting an increase in annual wage versus a decline. Overall, the median annual wage across all occupations in California barely moved in 2013 compared with the previous year, edging up by just 0.4%.

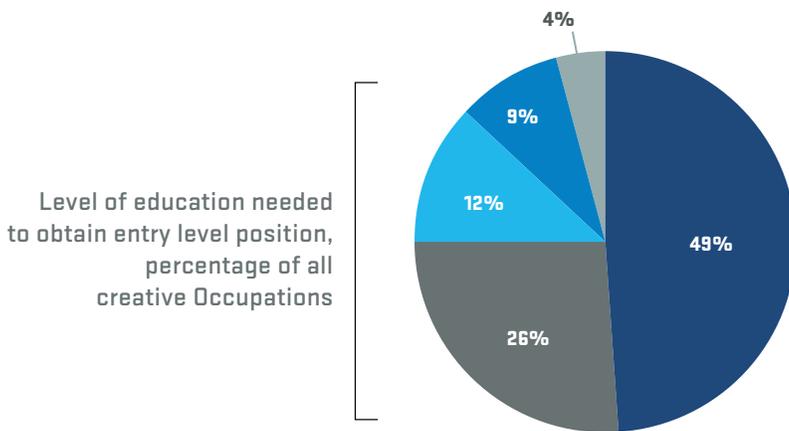
There are several reasons why many of the creative occupations below might have suffered a decline in wages. The first is a shift from wage and salary employment to independent contracts (nonemployers). Some of these occupations may also be concentrated in industries that are declining or are in the process of transforming through technological change. Another possibility that reflects trends in the labor markets at large, is that more people in creative occupations are working part time, which would cause a decline in the annual wage.

**Selected Annual Median Wage  
for Creative Occupations,  
2013**

Software Developers	<b>\$107,870</b>
Producers & Directors	<b>\$93,750</b>
Architects	<b>\$85,940</b>
Multimedia Artists & Animators	<b>\$81,290</b>
Writers & Authors	<b>\$79,140</b>
Film & Video Editors	<b>\$78,660</b>
Art, Drama & Music Teachers	<b>\$70,270</b>
Sound Engineering Technicians	<b>\$67,470</b>
Fashion Designers	<b>\$64,770</b>
Commercial & Industrial Designers	<b>\$64,350</b>
Interior Designers	<b>\$57,790</b>
Fabric & Apparel Patternmakers	<b>\$52,520</b>
Graphic Designers	<b>\$52,010</b>

**Source:** Bureau of Labor Statistics, Occupational Employment Statistics

**CREATIVE OCCUPATION ENTRY LEVEL  
EDUCATION REQUIREMENTS**



**49%** Bachelor's degree or higher  
**26%** High school diploma  
**12%** Not specified  
**9%** Some college or AA  
**4%** Less than high school

**Source:** California EDD, SOC data

### Note: Median versus Mean

Although median and mean (or averages) are both measures of a “typical” value for a data set, the median wage is used in this section to represent what a typical worker in a given occupation earned in 2013. The median is calculated by arranging the data from lowest to highest - the middle number is the median. If a dataset is evenly distributed, the median will be very close to the mean, but when data is skewed, meaning there are exceptionally high or low numbers, the mean can differ from the median by a wide margin. For example, agents and business managers of artists and performers in California have a mean annual wage of \$127,930, but a median annual wage of \$85,770 – a difference of nearly \$42,200. This implies there are individuals employed in this occupation earning an exceptionally high annual wage. These individuals skew the mean wage significantly higher than the median, giving an inaccurate impression of what most people can expect to earn in this occupation.

TABLE 6:  
Employment and Earnings for Selected Creative  
Occupations, 2012 vs. 2013

California Occupation	Employment			Median Annual Wage		
	2012	2013	#Change	2012	2013	%Change
Architects	10,270	10,340	70	\$85,180	\$85,940	0.9%
Art, Drama & Music Teachers	12,201	11,380	-821	\$77,800	\$70,270	-9.7%
Commercial & Industrial Designers	3,370	3,660	290	\$60,930	\$64,350	5.6%
Fabric & Apparel Patternmakers	2,210	2,020	-190	\$46,020	\$52,520	14.1%
Fashion Designers	5,020	5,720	700	\$63,630	\$64,770	1.8%
Film & Video Editors	5,830	7,970	2,140	\$81,790	\$78,660	-3.8%
Graphic Designers	25,880	26,290	410	\$52,320	\$52,010	-0.6%
Interior Designers	6,540	6,200	-340	\$59,000	\$57,790	-2.1%
Multimedia Artists & Animators	9,220	10,300	1,080	\$76,400	\$81,290	6.4%
Producers & Directors	24,410	25,440	1,030	\$105,680	\$93,750	-11.3%
Software Developers	88,260	95,510	7,250	\$102,520	\$107,870	5.2%
Sound Engineering Technicians	3,670	3,690	20	\$64,490	\$67,470	4.6%
Writers & Authors	7,120	7,770	650	\$72,270	\$79,140	9.5%

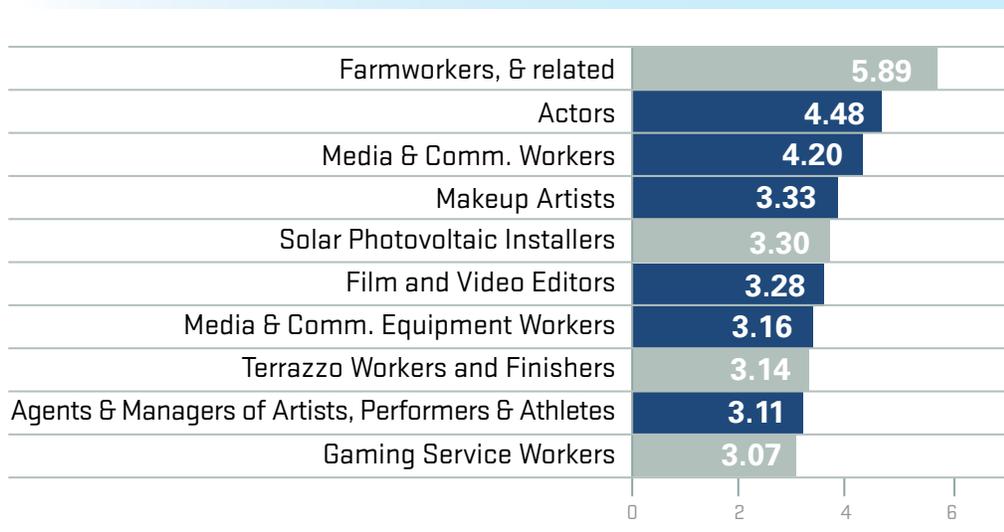
## WHAT IS A LOCATION QUOTIENT?

A location quotient (LQ) can be used to quantify the concentration of a particular industry, industry cluster, occupation or demographic group in a region compared to the nation. It reveals what makes a region unique and gives an indication of where a region has a competitive advantage.

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

As Indicated in the figure, California has high LQs in a number of creative occupations, meaning that it has a higher concentration of those occupations than the nation as a whole. These include actors, media and communications workers, makeup artists, and agents and managers of artists and performers.

Occupations with  
the Highest Location-  
Quotients in  
**California**



**Source:** Bureau of Labor Statistics, Occupational Employment Statistics

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# LOOKING AHEAD: THE CREATIVE ECONOMY IN 2018

California has made steady economic progress over the past year, experiencing overall job gains that have exceeded the nation as a whole. As of 2014, it had recovered and surpassed the pre-recession peak of 15.4 million jobs from 2007. Most, but not all, industries have participated in these gains. Service-producing industries have largely improved, although there was variation across sectors. Among the goods-producing industries, manufacturing has faced the biggest challenge as global competition and the need for efficiency continue to drive increased use of automation at the expense of workers. At the same time, there has been continued growth in information technology (IT) and health care services, along with increases in professional and business services employment, and the trade industries.

Creative industries have participated in these gains. Digital media has thrived on the strength of the IT and related industries. Architecture and interior design, which is tied to real estate, has seen a substantial increase in employment, while furniture and decorative arts has seen a more modest gain. More generally, better conditions in the overall economy have increased the amount of discretionary income that is available to households. This has led to more spending on entertainment, clothing, and other consumer goods.

Will these trends continue? This section looks ahead to 2018, first with projections for the overall economy, followed by employment projections for the creative industries.

Over the period from 2013 through 2018, California's wage and salary jobs are expected to grow by approximately two percent per year, exceeding the nation's pace of job growth throughout the period. The state surpassed its pre-recession job peak in 2014 adding jobs across most sectors of the economy, with significant increases continuing in health care, IT, and construction and real-estate related activities. While the state's unemployment rate has come down more quickly than the nation's, it will remain somewhat higher than the U.S. rate, consistent with the long-term trend that has persisted over recent decades.

The LAEDC projects that creative industry employment in California will grow from 684,500\* jobs in 2013 through 2018 to 711,600 wage and salary jobs, increasing by 4.0% or 27,100 jobs. All of the creative industries will experience wage and salary job gains except for fashion. With anticipated increases in residential construction in 2015-16, there will be increased demand for architecture and interior design, as well as furniture and the decorative arts. This will drive demand upstream to industrial design. As California's economy improves, household expenditures on art, entertainment, and toys should grow and lend support to these creative industries. Throughout the period, job gains will gradually close the gap between current employment and the pre-recession peak level of 760,000 jobs that prevailed in 2007.

In percentage terms, both communication arts and product/industrial design will lead the way with 13.6% increases, although communication arts is nearly twenty times larger than product/industrial design in absolute terms. Architecture and interior design will see an anticipated 11.2% increase, followed by digital media (10.9%), entertainment (8.6%), and furniture and decorative arts (6.2%), with smaller gains occurring across the other creative industries aside.

The figures above track changes in wage and salary employment only. As noted earlier in this report, many creative industries rely to varying degrees on freelance workers and independent contractors along with wage and salary workers. As such, the historical and projected job counts cited here generally under-estimate total creative employment overall and employment in the individual industries.

**TABLE 7:**  
Creative Industries Employment Forecast,  
2013 – 2018

Creative Industry	Number of Jobs (thousands)		2013-2018 Change	
	2013	2018f	Number	Percent
Architecture & Interior Design	37.4	41.6	4.2	11.2%
Art Galleries	2.2	2.3	0.1	3.1%
Communication Arts	44.2	50.2	6.0	13.6%
Digital Media	53.5	59.3	5.8	10.9%
Entertainment	164.0	178.0	14.1	8.6%
Fashion	120.1	106.2	-13.8	-11.5%
Furniture & Decorative Arts	68.6	72.9	4.3	6.2%
Product/Industrial Design	2.1	2.4	0.3	13.6%
Publishing & Printing	131.2	134.3	3.1	2.3%
Toys	7.4	7.6	0.2	3.1%
Visual & Performing Arts Providers	53.9	56.9	3.0	5.5%
<b>Totals:</b>	<b>684.5</b>	<b>711.6</b>	<b>27.1</b>	<b>4.0%</b>

**Source:** California EDD LMID, QCEW data; forecasts by LAEDC

**\*Note:**

1. 684,500 does not include fine arts employment at public universities. See note on page 56 for further explanation.

# INDUSTRY SNAPSHOTS

## ARCHITECTURE AND INTERIOR DESIGN

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

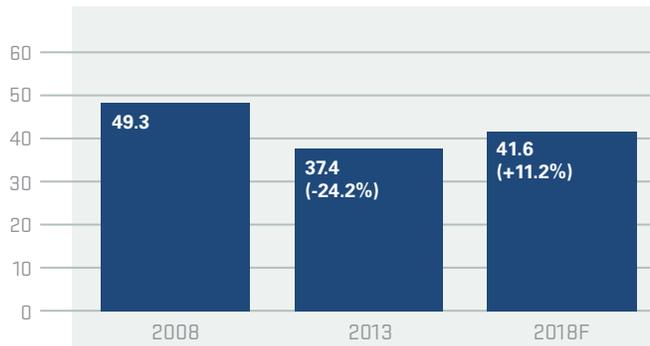
Architects create beauty from functional and structural necessity. Without beauty (a highly subjective quality to be sure), a building is merely functional, while good architecture surprises, inspires and delights the observer.

Interior designers make interior space functional, safe and beautiful for almost any type of building including homes, offices, restaurants, retail stores, hotels and airports. Interior designers must also understand how the look and feel of a space will affect the people who use it.

The art of landscape designers achieves a balance between the man-made and natural environments. Their work combines art, environmental sciences and ecology. Great landscape design not only creates beautiful outdoor space but also can protect endangered habitat, reduce hospital stays, and conserve energy.

Employment in this creative sector has yet to fully recover from the Great Recession, but job counts have been trending up since 2010 and further improvement is expected as the overall economy and the construction sector register gains in the coming years.

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Architecture and Interior Design Industry, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>5,669</b>	OUTPUT: <b>\$9.4</b> Billion
JOB: <b>37,400</b>	TOTAL JOBS: <b>65,600</b>
LABOR INCOME: <b>\$2.8</b> Billion	LABOR INCOME: <b>\$4.4</b> Billion
NONEMPLOYER ESTABLISHMENTS: <b>17,406</b>	TAXES: <b>\$0.4</b> Billion

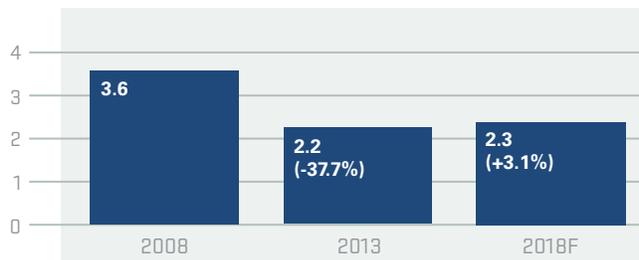
## ART GALLERIES

California is home to three of the ten most creative metropolitan areas in the country: San Francisco (#1), Los Angeles (#7) and Oakland (#10).<sup>6</sup> California also boasts many smaller arts enclaves, rich in creativity. Over the decades, artists and galleries have created their own communities throughout California including Carmel, Mendocino and Laguna Beach. From “art neighborhoods” to warehouse districts located in old industrial areas to rural towns, California is home to numerous galleries featuring contemporary and traditional fine art, paintings, glass art, sculpture, fine art photography and other types of visual art. The presence of artists and art galleries not only enhances the quality of life for local residents, they are a major draw for cultural tourists as well.

There were 615 art galleries with 2,200 employees across California in 2013. The total economic impact was 2,900 jobs and output of \$224 million. In addition, 2,373 independent art dealers were found in the nonemployer data for California with sales of \$150 million during 2012 (latest data available).

<sup>6</sup> Carlyle, Erin, “America’s Most Creative Cities in 2014,” (July 2014) <http://www.forbes.com/sites/erincarlyle/2014/07/15/americas-most-creative-cities/>

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of Art Galleries, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>615</b>	OUTPUT: <b>\$224</b> Million
JOBS: <b>2,200</b>	TOTAL JOBS: <b>2,900</b>
LABOR INCOME: <b>\$106</b> Million	LABOR INCOME: <b>\$142</b> Million
NONEMPLOYER ESTABLISHMENTS: <b>2,373</b>	TAXES: <b>\$25</b> Million

## COMMUNICATION ARTS

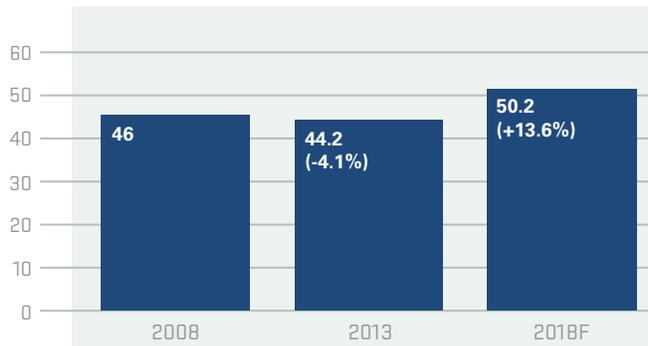
Individuals working in the communication arts combine art and technology to communicate ideas through images and other communications media. This diverse sector is dominated by advertising agencies and firms that specialize in graphic design, and includes commercial and portrait photographers.

Advertising firms employ creative staff to design the content and visual elements of client ad campaigns. Working with both text and images, advertising firms create visual concepts by hand or using computer software to communicate ideas that inspire, inform or captivate consumers. They help to make an organization recognizable by selecting colors, images or logo designs that represent a particular idea or identity.

Graphic arts designers are the next largest sector. Graphic designers create “visual solutions” to communications problems using both digital and print media. Graphic designers are involved in the production of magazines, newspapers, corporate reports and other publications. They also design packaging, brochures and logos for products and businesses. An increasing number of graphic designers are involved in developing material for the Internet, interactive media and multimedia projects.

Employment in this sector fell modestly during the recession, bottoming out in 2010. It recovered nearly three-quarters of the recession-induced job losses through 2013 and will continue to edge up in the coming years.

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Communication Arts Industry, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>5,689</b>	OUTPUT: <b>\$11.8</b> Billion
JOB: <b>44,200</b>	TOTAL JOBS: <b>71,600</b>
LABOR INCOME: <b>\$3.7</b> Billion	LABOR INCOME: <b>\$5.2</b> Billion
NONEMPLOYER ESTABLISHMENTS: <b>81,391</b>	TAXES: <b>\$0.5</b> Billion

## DIGITAL MEDIA

The prominence of the digital media industry in California is closely related to the presence of the entertainment industry in Southern California and technology firms located in Silicon Valley and the Bay Area. The actual size of the digital media industry is difficult to calculate. There is still no precise definition of the industry, and digital media activity is very likely to be found in related sectors such as motion picture production, publishing and software design.

Digital media artists work in 3D/2D entertainment arts (games, animation, film); imaging (editorial, retail, comic, info-graphics); video and motion graphics (TV, web, film corporate); and interactive media (web, mobile).

Individuals working in digital media may also be employed by architectural firms to create images of building designs or in the fashion industry engaged in designing digital patterns to be printed on fabrics. Others work for advertising agencies and computer systems design firms and independent specialized design companies. Additionally, with the growth of digital media in entertainment, more and more digital artists are moving onto the payrolls of film studios.

Despite its potential to impact other creative sectors as well as industries outside the creative economy, traditional data sources do not fully reflect total employment in the digital media industry. This report selects software publishers as the industry that best fits this activity. A large number of software programmers are independent contractors who are not captured by traditional data sources.

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Digital Media Industry, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>1,178</b>	OUTPUT: <b>\$53.2</b> Billion
JOBS: <b>53,500</b>	TOTAL JOBS: <b>212,300</b>
LABOR INCOME: <b>\$8.8</b> Billion	LABOR INCOME: <b>\$17.4</b> Billion
NONEMPLOYER ESTABLISHMENTS: <b>NA</b>	TAXES: <b>\$1.6</b> Billion

## ENTERTAINMENT

While the entertainment industry is undoubtedly a pillar of the Los Angeles economy, it is also an indispensable component of the state economy. A vibrant independent film making industry has taken root in San Francisco with film schools, incubators, film grant programs and internationally renowned film festivals.

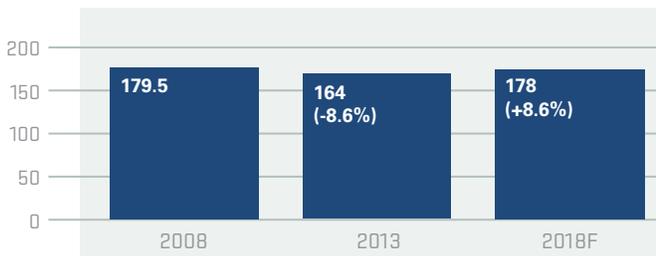
The motion picture and sound recording sector forms the core of the state's entertainment industry. Activity in this sector generates huge economic benefits for the state both directly and indirectly. Filming on sound stages and on-location employs actors, camera operators and directors, but the production of a movie also requires workers across sectors as diverse as technical services, transportation, food services and security. Behind the scenes, the entertainment industry provides jobs for accountants, lawyers and insurance firms. Film studios and related activities are also users

of large amounts of office and industrial real estate. In addition, the entertainment industry is a major source of export revenues for the region because of the royalties earned overseas by films and TV shows produced in California.

Several activities are included here: sound recording, motion picture and TV production, and cable TV broadcasting as well as radio stations. Musicians might be included here for recording film scores, but since many perform on the stage as well as in the studio, they may be included as employees or as nonemployer firms in the visual and performing arts sector.

Modest gains in this industry are expected over the forecast horizon, with employment projected to approach the pre-recession peak by 2018.

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### CALIFORNIA FILM TAX CREDIT:

In late August 2014, the Governor signed a bill that will triple the California Film Tax Credit to \$330 million annually over the next five years. This bill is aimed at reversing runaway film production by offering incentives to studios to keep production in California. The increase in filming locally will result in the creation of thousands of new jobs in the state and strengthen one of L.A.'s signature industries.

### Economic Contribution of the Entertainment Industry, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>7,656</b>	OUTPUT: <b>\$76.9</b> Billion
JOBS: <b>164,000</b>	TOTAL JOBS: <b>332,600</b>
LABOR INCOME: <b>\$16.6</b> Billion	LABOR INCOME: <b>\$25.8</b> Billion
NONEMPLOYER ESTABLISHMENTS: <b>30,152</b>	TAXES: <b>\$2.3</b> Billion

## FASHION

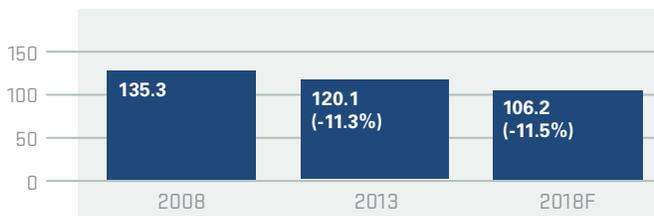
Apparel design, manufacturing and wholesaling make a significant contribution to California's economy. The industry is primarily concentrated in Los Angeles County. In Orange County, the fashion industry has a smaller footprint, but still manages to be quite diverse. San Francisco is also home to a significant number of fashion designers and is earning recognition as a fashion capital in its own right. In addition to apparel, the state's fashion industry also includes textiles and jewelry manufacturing as well as footwear, handbag and cosmetics production.

Design-related activity is the principal means by which the apparel industry retains a strong presence in California. Fashion goes hand-in-hand with the entertainment industry and

the visual arts. Designers are attracted to the creative energy that permeates California's larger metropolitan areas. The proximity of designers to local manufacturers also presents a clear advantage, enabling designers to check up on product and to personally communicate with managers on the front lines of production.

The industries described in this report are defined by a specific set of NAICS codes. Primary data sources track wage and salary jobs by NAICS codes but do not capture other jobs held by freelance workers, independent contractors and other self-employed workers. Like so many sectors in the creative economy, the fashion industry has a mix of both wage and salary, and self-employed workers. Direct employment in an industry captured by these NAICS codes is relatively easy to measure. However, this may still result in undercounting direct industry employment. For example, there are jobs in other industries that are directly related to the fashion industry but are not picked up in the above numbers. These may include individuals working as import/export agents who deal only in apparel-related goods or a graphic designer who works exclusively with textiles. A designer who owns her own boutique may be counted in the retail sector. Additionally, there are many educators working in the state's numerous fashion institutions who are counted in the Arts Education industry as opposed to Fashion. This illustrates the complicated linkages that exist between industries and the challenges involved in describing an industry and its contribution to the economy.

### Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Fashion Industry, 2013

#### DIRECT EFFECTS

ESTABLISHMENTS: **9,132**

JOBS: **120,100**

LABOR INCOME: **\$5.1 Billion**

NONEMPLOYER ESTABLISHMENTS: **14,397**

#### TOTAL EFFECTS

OUTPUT: **\$40.0 Billion**

TOTAL JOBS: **206,400**

LABOR INCOME: **\$10.3 Billion**

TAXES: **\$2.4 Billion**

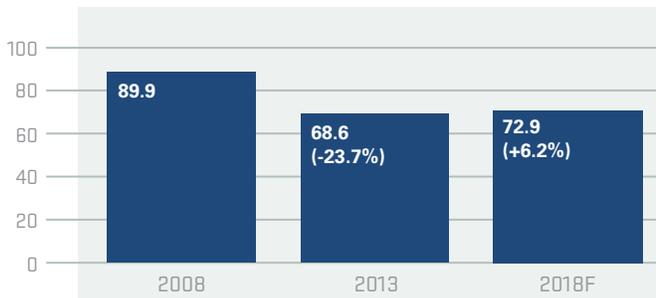
## FURNITURE AND DECORATIVE ARTS

This industry group includes firms that manufacture, warehouse, import and export furniture, and the furniture marts, such as the Pacific Design Center, the L.A. Mart and the San Francisco Design Center. This sector also includes textile products mills (e.g. sheets, towels and fabric window treatments), and china and pottery producers. Like apparel, these items are frequently designed locally, produced in Asia and shipped back to the U.S. for domestic distribution. The furniture marts have annual shows where manufacturers exhibit their products to wholesale buyers from around the nation.

The furniture and decorative arts sector exemplifies the tension between localization and globalization. While the state's manufacturers face growing competition from inexpensive overseas labor, local designers continue to produce innovative and beautiful furnishings. California is also home to hundreds of small artisans producing handcrafted and one-of-a-kind pieces. Additionally, the region's universities and colleges are home to a number of top rated furniture design programs and attract students from across the country.

While employment in this sector fell sharply over the course of the recession, it will benefit modestly from improvements in the housing sector with employment expected to increase by 6.2% over the next five years.

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Furniture and Decorative Arts Industry, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>4,361</b>	OUTPUT: <b>\$23.8</b> Billion
JOBS: <b>68,600</b>	TOTAL JOBS: <b>119,200</b>
LABOR INCOME: <b>\$3.2</b> Billion	LABOR INCOME: <b>\$6.2</b> Billion
NONEMPLOYER ESTABLISHMENTS: <b>5,084</b>	TAXES: <b>\$1.2</b> Billion

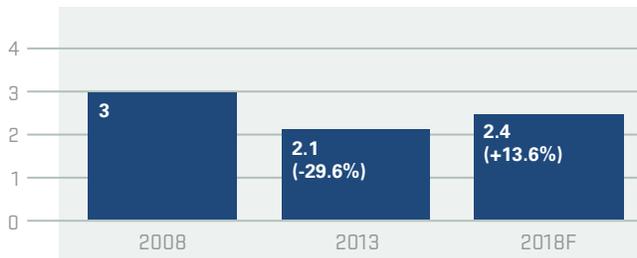
## PRODUCT AND INDUSTRIAL DESIGN

Industrial designers develop the concepts for manufactured products, such as cars, home appliances and mobile devices. They combine art, marketing, and engineering skills to make products that people use every day. A product designer focuses on the user experience in creating style and function for a particular object. Most specialize in a particular product category such as medical equipment or consumer electronics. Other product designers may develop ideas for furniture, sporting equipment or lifestyle accessories.

Producers of consumer products can no longer expect to catch the attention of the public with a product that is reasonably priced and merely functional – consumers have too many alternatives. Products must also be designed to be beautiful, unique and meaningful.

Many product and industrial designers are direct employees of companies that produce and sell a wide variety of products. The data in this report capture those working in creative industries like apparel or furniture manufacturing but do not include individuals working on other industries (e.g. custom fabricated metal products or aerospace). The figures shown below reflect specialized design firms that serve as outside contractors or independent consultants to manufacturers and construction firms. Though it is difficult to quantify, the design base in the state is larger than shown.

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Product and Industrial Design Industry, 2013

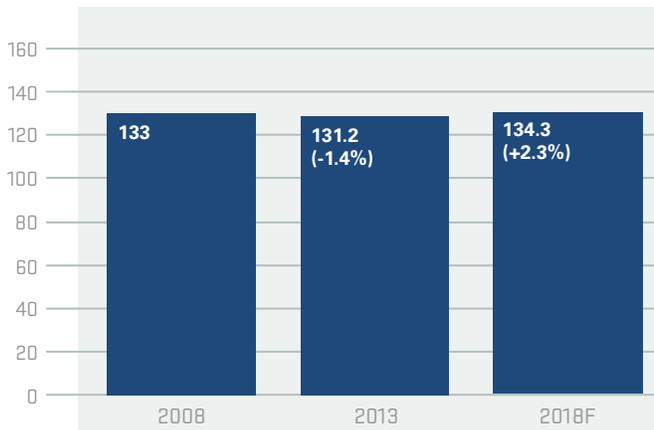
DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>313</b>	OUTPUT: <b>\$522</b> Million
JOB: <b>2,100</b>	TOTAL JOBS: <b>3,600</b>
LABOR INCOME: <b>\$191</b> Million	LABOR INCOME: <b>\$268</b> Million
NONEMPLOYER ESTABLISHMENTS: <b>N/A</b>	TAXES: <b>\$26</b> Million

## PUBLISHING & PRINTING

The traditional publishing and printing sector encompasses 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, apparel and other materials. This sector also includes libraries and archives, and internet publishing.

Although printing and publishing continue to be an important manufacturing industry in California, the sector has experienced large declines in the number of firms and workers employed in the industry over the last five years. Digital publishing displaces print media more and more each year. Growing numbers of individuals and businesses are accessing, reading and storing information in electronic formats. Digital printing technologies have also allowed smaller companies to compete in the same market as large commercial printers, while the low cost of digital printing has encouraged firms to bring their printing needs in-house.

Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Publishing and Printing Industry, 2013

#### DIRECT EFFECTS

ESTABLISHMENTS: **6,729**

JOBS: **131,200**

LABOR INCOME: **\$23.4 Billion**

NONEMPLOYER ESTABLISHMENTS: **15,682**

#### TOTAL EFFECTS

OUTPUT: **\$59.4 Billion**

TOTAL JOBS: **308,000**

LABOR INCOME: **\$33.3 Billion**

TAXES: **\$2.5 Billion**

## TOYS

The toy industry in the United States is very concentrated with the top 50 toy companies in the nation accounting for three-fourths of the industry's revenues.<sup>7</sup> While the job numbers are modest, California is a major force in the toy industry.

Much of the actual manufacturing of toys takes place in Asia, but most design and marketing functions have been retained in California's larger metropolitan areas because of local creative talent pools and supportive training programs. Toy companies are also drawn by the region's extensive warehouse and distribution system.

California's toy industry benefits from its close ties to the area's entertainment industry

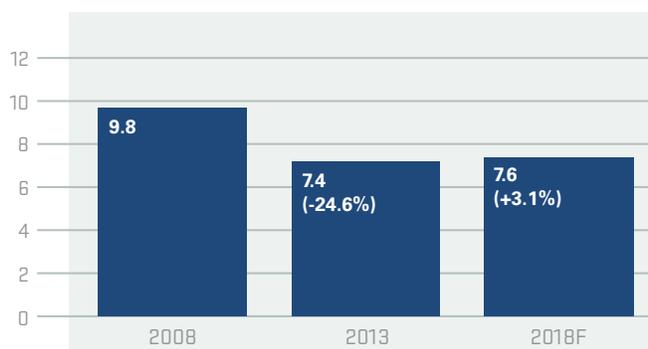
through licensing agreements with the major film studios. Approximately 30% of all toys sold in the U.S. are licensed.<sup>8</sup> Hollywood and the entertainment industry also help draw design talent to the state. In addition to the entertainment industry, California's design talent also looks to the fashion industry, textiles, food and music for inspiration.

Similar to what is happening in so many other industries, technology and innovation are reshaping toy manufacturing. Children are mastering technology faster and at younger ages prompting many top companies to integrate electronic features into traditional toys and games.

<sup>7</sup> "The Transformational Toy Industry," Little & King Company, LLC (2010)

<sup>8</sup> "Observations on toys and Trends," Toy Industry Association, (August 2013)

### Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Toy Industry, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>465</b>	OUTPUT: <b>\$4.0</b> Billion
JOBS: <b>7,400</b>	TOTAL JOBS: <b>14,900</b>
LABOR INCOME: <b>\$0.8</b> Billion	LABOR INCOME: <b>\$1.2</b> Billion
NONEMPLOYER ESTABLISHMENTS: <b>1,154</b>	TAXES: <b>\$0.3</b> Billion

## VISUAL AND PERFORMING ARTS

California is home to an impressive number of internationally renowned arts institutions—world-class museums, symphonies, opera and ballet companies, and theater troupes, many of which are housed in concert halls and theaters that are works of art in their own right.

Activities in this group 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 non-profit organizations.

Surveys of people's attitudes toward the performing arts have shown that the arts are viewed as improving the quality of life in a neighborhood or city and are a source of community pride. People who visit museums

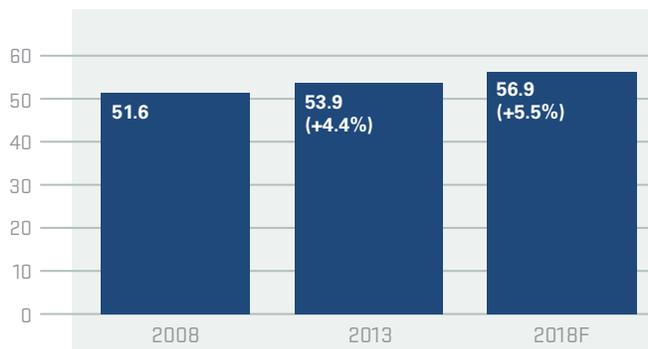
and attend dance, music or theatrical performances say the arts promote understanding of other people, help to preserve and share cultural heritage and contribute to lifelong learning in adults, and that the arts contribute to the education and development of children. Significantly, even people who do not attend performing arts exhibitions share this view.<sup>9</sup>

There is no question that visual and performing arts make communities more desirable places to live. From an economic development standpoint, quality of life is critical to attracting an educated and productive workforce. In today's global economy, the regions that attract and retain talent are the ones that will grow and prosper.

9

"The Value of Performing Arts in Five Communities 2," Urban Institutes (January 2004)

### Employment, 1000s



Source: California EDD, ES202 data; forecasts by LAEDC

### Economic Contribution of the Visual and Performing Arts Industry, 2013

DIRECT EFFECTS	TOTAL EFFECTS
ESTABLISHMENTS: <b>10,768</b>	OUTPUT: <b>\$13.6</b> Million
JOBS: <b>53,900</b>	TOTAL JOBS: <b>97,200</b>
LABOR INCOME: <b>\$6.6</b> Billion	LABOR INCOME: <b>\$8.9</b> Million
NONEMPLOYER ESTABLISHMENTS: <b>148,744</b>	TAXES: <b>\$0.7</b> Million

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# NONPROFIT SEGMENT OF THE CREATIVE ECONOMY

The importance of the arts and culture to economic development is well established. Because many arts organizations are nonprofits, they rely heavily on charitable contributions and volunteers which are not captured in typical economic statistics like employment and payroll. However, to leave these organizations out of this analysis would present an incomplete picture of the creative sector and the role it plays in California's economy.

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

These SOI data are cumulative and are the most recent information the IRS has on file for exempt organizations. The year designation on SOI files is based on the starting year for an organization's tax return, which is not necessarily its fiscal year. Therefore, these data do not cover a specific calendar year but instead, provide a snapshot of the state's nonprofit arts sector at the time it was accessed ([August 2014](#)). Additionally, the SOI data do not contain information pertaining to employment.

The nonprofit sector also suffered during the recession. In many organizations, resources were stretched to the limit as demand for services increased but donations and access to government funding declined. Like other segments of the economy, however, the nonprofit sector is slowly improving. Compared with the figures reported in last year's Creative Economy report, asset values and the number of arts and cultural organizations have increased, but income suffered a sharp decline. Achieving long-term financial stability continues to be a challenge for many nonprofit organizations.

**TABLE 8:**  
**Comparison Nonprofit Sector Figures Reported**  
**2013 Otis Report vs. 2014**

Based on Sample:	2013	2014	%Change
No. of Organizations	8,027	8,440	5.1%
Reported Income (\$B)	\$7.0	\$5.7	-18.6%
Reported Assets (\$B)	\$13.7	\$14.4	5.1%

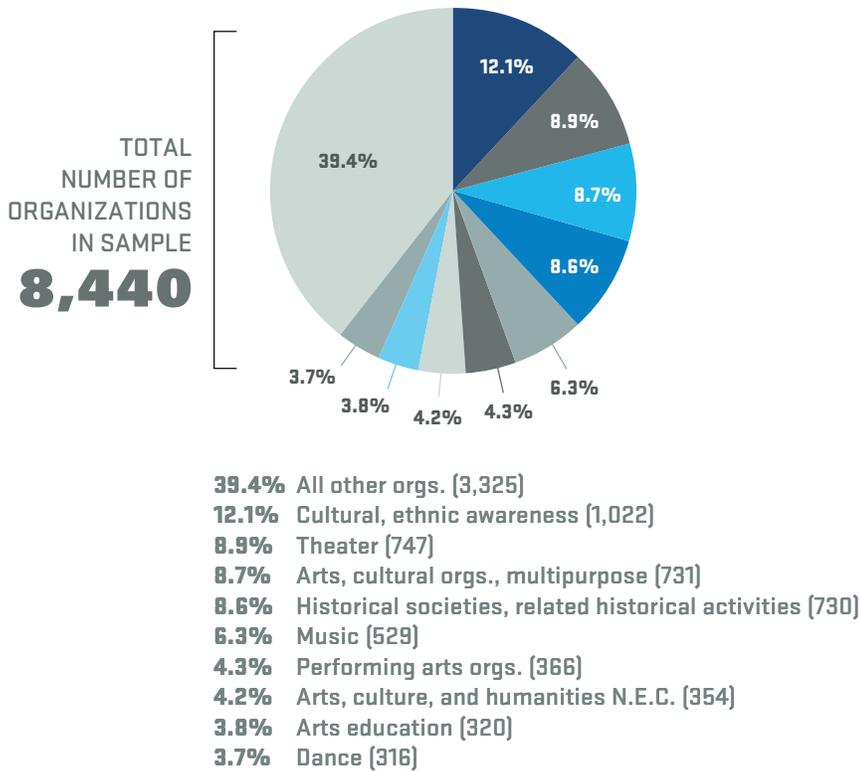
**Source:**  
 IRS SOI Statistics

The SOI sample contained a total of 8,440 nonprofit organizations in California classified as arts, culture and humanities organizations. While there are 39 defined arts-related subsectors, nonprofit organizations in California were heavily concentrated in cultural, ethnic awareness (12.1% of the total); theater (8.9%); and arts, cultural, multipurpose organizations (8.7%). While not among the largest sectors in terms of the number of organizations, nonprofit arts education figures prominently in the state. There were 320 arts education groups in the sample, comprising 3.8% of the total.

The total income reported by the sample of nonprofits in California amounted to \$5.7 billion. Art museums earned 12.9% of nonprofit income in the state. History museums earned a 6.7% share of the total, followed by symphony orchestras (6.1%); museums, museum activities (6.0%); and theaters (5.6%).

Another way to measure the importance of the nonprofit sector is to look at the collective value of assets owned by nonprofit organizations in the region. As of August 2014, nonprofits in the California nonprofit sample reported assets valued at \$14.4 billion to the IRS. The largest share of assets was concentrated in art museums (21.3%); history museums (9.9%); and natural history and science museums (7.1%). It is not surprising museums should comprise such a large share of nonprofit assets given the value of the collections residing in California's museums and the value of the real estate in which they are housed.

**LARGEST ARTS NONPROFIT SECTORS BY NUMBER OF ORGANIZATIONS BASED ON SOI SAMPLE STATISTICS<sup>10</sup>**



Source:  
IRS SOI Statistics

<sup>10</sup>  
**Note:** All the figures related to the nonprofit sector cited above and in Table 9 are derived from a representative sample of nonprofit organizations in California. While useful inferences can be made based on this sample, it does not include the entire universe of nonprofit organizations in the state.

Although the size and reach of the arts-related nonprofit sector in California is impressive, the contribution these organizations make to California’s economy is much larger than the figures cited above indicate. The activities of this sector’s many salaried and volunteer workers, and the charitable contributions made by individuals and corporations generate a significant amount of economic activity in California.

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

**TABLE 9:**  
**California Arts-Related Nonprofit Sector,**  
**August 2014**

<b>NTEE Code</b>	<b>Description</b>	<b>Number of Organizations</b>	<b>Asset Amount (\$1,000s)</b>	<b>Income Amount (\$1,000s)</b>	<b>Form 990 Revenue Amount (\$1,000s)</b>
A01	Alliance/advocacy organizations	17	\$1,941.8	\$6,056.0	\$6,055.7
A02	Management and technical assistance	7	104,493.4	31,084.3	20,379.1
A03	Professional societies, associations	34	25,275.1	41,608.2	37,640.1
A05	Research institutes and/or public policy analysis	9	6,001.8	1,238.2	905.7
A11	Single organization support	149	898,327.9	265,322.6	116,068.6
A12	Fund raising and/or fund distribution	105	405,591.6	16,809.1	13,844.8
A19	Nonmonetary support N.E.C.*	26	4,481.6	5,223.1	4,940.7
A20	Arts, cultural organizations - multipurpose	731	511,578.4	177,239.7	153,433.2
A23	Cultural, ethnic awareness	1022	557,041.8	300,869.1	129,476.9
A25	Arts education	320	275,387.8	317,463.3	220,006.0
A26	Arts council/agency	94	82,713.1	60,938.7	27,266.2
A30	Media, communications organizations	95	146,778.8	121,872.8	104,889.1
A31	Film, video	298	179,957.2	191,902.0	184,825.9
A32	Television	80	234,053.4	152,176.2	147,988.3
A33	Printing, publishing	152	156,978.8	147,980.9	138,585.8
A34	Radio	67	429,336.5	200,810.6	196,974.5
A40	Visual arts organizations	188	33,668.6	23,623.1	19,736.6
A50	Museums, museum activities	276	962,772.3	342,971.6	239,990.5
A51	Art museums	130	3,079,733.1	741,625.0	468,188.6
A52	Children's museums	33	133,567.6	32,882.5	30,468.8
A54	History museums	206	1,436,870.8	386,661.5	214,245.3
A56	Natural history, natural science museums	36	1,020,852.2	149,887.6	134,646.8
A57	Science and technology museums	28	224,622.9	99,686.6	73,813.6
A60	Performing arts organizations	366	35,886.8	37,742.1	35,308.9
A61	Performing arts centers	98	663,709.3	193,278.6	149,871.5
A62	Dance	316	38,918.3	31,493.4	30,040.7
A63	Ballet	81	73,858.5	81,219.6	72,089.9
A65	Theater	747	469,872.2	321,896.0	301,031.4
A68	Music	529	174,242.9	97,452.3	82,663.0
A69	Symphony orchestras	151	705,467.9	350,132.1	280,626.2
A6A	Opera	79	359,729.1	213,342.1	164,869.8
A6B	Singing, choral	251	24,872.5	31,292.3	29,179.4
A6C	Music groups, bands, ensembles	165	11,978.0	12,450.3	11,197.2
A6E	Performing arts schools	86	468,673.5	291,962.8	96,213.4
A70	Humanities organizations	251	73,253.1	66,424.9	61,581.6
A80	Historical societies, related historical activities	730	324,268.2	115,813.6	88,211.1
A84	Commemorative events	87	34,872.8	7,735.4	4,684.3
A90	Arts service organizations and activities	46	12,231.7	10,714.9	10,357.6
A99	Arts culture and humanities N.E.C.*	354	70,179.2	65,150.7	40,770.0
		<b>8,440</b>	<b>\$14,454,041</b>	<b>\$5,744,034</b>	<b>\$4,143,067</b>

\*Not otherwise classified

Source: IRS SOI Statistics

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# K-12 ARTS EDUCATION:

Education in the arts is a necessary part of preparing students to meet the demands of the twenty-first century workforce where young people now have to compete in a global labor market. Much attention is paid to STEM (science, technology, engineering and mathematics) courses as a vehicle for preparing students to meet the challenges of an increasingly interconnected world. There is concern that too few STEM-educated students (especially girls) are entering the workforce at sufficient performance levels to meet labor market demand. The arts and the sciences are still seen as separate educational tracks with students encouraged to specialize in one or the other, but if nurturing creative students is desirable, then this kind of thinking can be limiting. One way to persuade more young people to pursue STEM-related subjects is to incorporate the arts into a STEM course of study thus moving from STEM to STEAM.

Arts education fosters creative, critical thinking, problem solving and collaboration. Viewed in this context, creativity has become as important in modern education as mastering specific language and computation skills. Technological innovation is moving ahead so rapidly that functional capabilities have become less important to employers than the ability of employees to reinvent and adapt themselves to a dynamic industry and economic environment. In other words, workers need to be creative. They also need to be skilled at communicating their ideas to co-workers in a collaborative environment. It then follows that creativity training via the arts may be a component of a successful workforce development strategy.

Additionally, while no one questions the necessity of mastering language, math and science skills, a singular focus on these subjects ignores the needs of students whose talents run in a different direction. Marginalizing the arts risks these young people becoming frustrated and dropping out of school altogether. When this happens, they may never develop their unique talents or realize their full potential. In addition to the individual loss, society as a whole is diminished.

There is a large body of research that has shown that arts education engages students in learning and promotes academic success. When students are engaged, truancy and dropout rates decline.<sup>11</sup> Student involvement in the arts is linked to higher academic performance, increased standardized test scores, and greater involvement in community service and civic engagement, especially among disadvantaged students.<sup>12</sup>

11  
The high school dropout rate in California is improving. In 2010, the rate was 16.6%. It fell to 14.7% in 2011 and by 2012, it was down to 13.1%; <http://www.kidsdata.org/>

12  
[www.AmericansForTheArts.org](http://www.AmericansForTheArts.org)

Studies have demonstrated that students who attend schools where the arts are integrated into the classroom curriculum outperform their peers in math and reading who did not have an arts integrated curriculum. Data from the College Board show that in 2013, students who took four years of arts and music classes while in high school scored an average of 95 points better on the SATs than students who took only one-half year or less.<sup>13</sup> Thus, arts education at the K-12 level is very important for both social and economic reasons.

The California Department of Education tracks student enrollment number of classes, average class size and the number of teachers by subject area.<sup>14</sup> This allows for the analysis of student participation in creative courses at the K-12 level. The Department of Education has expanded this data set so that in this year's report a more detailed analysis is possible. This section has been expanded from a discussion limited to art, dance, music and theater classes to include media, entertainment, design and information technology. This more inclusive set of "creative" subject areas aligns more closely with the industries and occupations that define the entire creative economy (see **Table 17** in the appendix for a complete list of subject areas and courses). What follows below and in more detail in the appendix tables is a description of the state's K-12 creative talent pipeline.<sup>15</sup>

Since peaking in 2004, California's child population has declined by 4.2%, while the population of school age children fell by 5.5%.<sup>16</sup> K-12 student enrollment in creative subject areas during the 2012-13 academic year (AY) fell by 5.7% over the year, roughly corresponding to a decline in the number of classes offered in these subject areas (-7.9%). However, the number of creative classes that met UC/CSU entrance requirements edged up by 1.5% compared with the previous year, perhaps reflecting greater emphasis on preparing students for college. Known as the "A-G" subject requirements, the intent of these requirements is to ensure students will be able to fully participate in the first-year program at a UC/CSU university in a wide variety of fields of study. Over the five year period 2007-08 AY to 2012-13 AY, enrollment in creative courses expanded by 4.2%. Over that same period, the number of classes offered in creative subject areas increased by 15.3%, while the number of classes meeting UC/CSU requirements rose by 19.8%.

Over the last five years, the fastest growing creative course subject areas have been arts, media and entertainment (increasing by a factor of five); marketing; engineering and design; and fine and performing arts (IB, see notes on page 67). Dance, English and music grew at more moderate rates, while information technology somewhat surprisingly remained unchanged. It may be that as computer skills are incorporated into a wider variety of subject areas, students are drawn to other courses such as media and design. Losing ground in student enrollment were art; drama; fashion and interior design; building trades (cabinet making, construction technology and

13 "Arts Students Outperform Non-Arts Students on SATs", <http://www.americansforthearts.org/>

14 Measured as Full-Time Equivalent (FTE). A FTE measure is a way of equating the number of full- and part-time employees. A full-time employee counts as one FTE; two part-time employees who each work half-time are also equal to one FTE.

15 Creative course subject areas: art; arts, media and entertainment; building trades and construction; computer education; consumer and family studies; dance; drama/theater; engineering and design; English; fashion and interior design; fine and performing arts (IB); information technology; manufacturing and product development; marketing sales and services; and music.

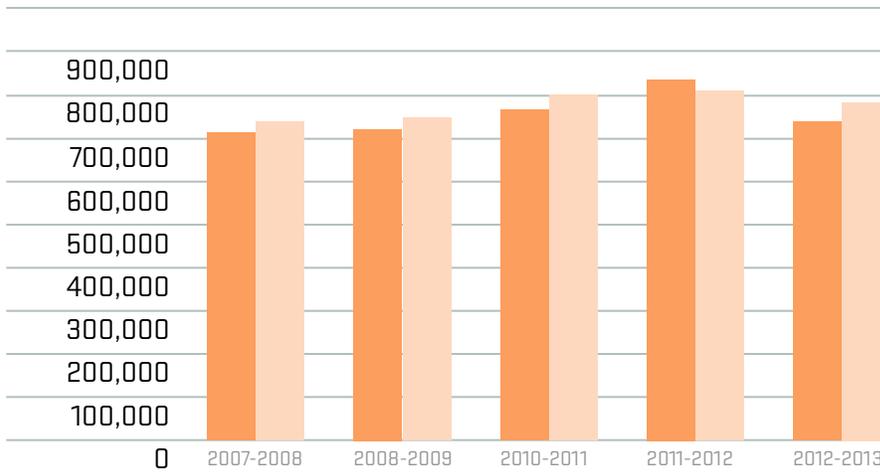
16 According to the California Department of Finance, K-12 enrollment in California will grow by 0.8% (50,000 students) by 2022-2023. Birth projections indicated a decline contributing to lower elementary enrollment and reduced growth for future total enrollment. Secondary enrollment is projected to decrease through 2016-2017 followed by almost no change for two years and then moderate increases through 2022-23.

woodworking); computer education; consumer and family studies; and manufacturing and product development. Looking at enrollment in creative subject areas by sex, the distribution between males and females has been consistent and fairly even over the last five years with females comprising 50.7% of creative course enrollment and males 49.3%.

There is considerable variation by subject area, but given the current emphasis on STEM-related courses, it is interesting to note the ratio of males to females in engineering and design classes over the past five years has been skewed heavily to males. Encouragingly, the share of female enrollment is improving. During the 2007-08 AY, the ratio was 79% to 21%. By 2012-13, the ratio of male to female engineering and design students had improved to 75% versus 25%. Since the 2007-08 AY, the number of girls enrolled in these courses has increased by nearly 60%.

Why is it important to encourage more girls to enroll in engineering and other STEM classes? Engineering touches almost every aspect of modern life; art and design are a key part of engineering. Furthermore, technology and design are becoming increasingly important to U.S. economic growth. Occupations in these fields also tend to earn higher salaries. There is currently a gender imbalance in engineering and other technical professions that has largely closed in many other industries. Although young women have indicated they are interested in math and engineering, they perceive there are still gender barriers to studying these subjects. Encouraging more girls to study engineering and design and to enter technical occupations would increase employment opportunities for young women and would be a step forward in closing the gender wage gap.

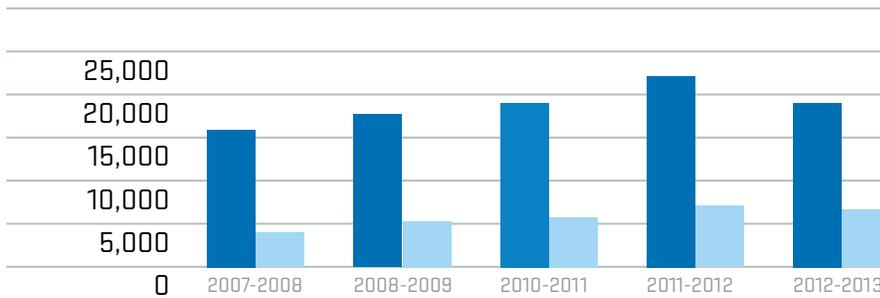
**Note:** California is fortunate in the richness and caliber of higher education programs available in the arts. The number of persons employed in post-secondary arts education is difficult to pin down. Individuals who work at fine and performing arts schools are reported in the EDD employment data (NAICS 61151). However, arts educators at colleges and universities and technical schools that offer degree programs in the visual and performing arts are not separated in the employment data.



**ENROLLMENT  
IN CREATIVE COURSES  
BY SEX**

**Source:** California Department of Education, DataQuest

**MALE ENROLLMENT**  
**FEMALE ENROLLMENT**



**ENROLLMENT IN  
ENGINEERING AND DESIGN  
COURSES BY SEX**

**Source:** California Department of Education, DataQuest

**MALE ENROLLMENT**  
**FEMALE ENROLLMENT**

### **Why did we write this report?**

First, understanding the size and contribution of the creative industries to the state economy is a critical first step toward enabling greater statewide coordination of resources and services to support those industries. This could include statewide policies that support the creative industries infrastructure, improve access to financial investment and business support programs and in turn, ensure the sustainability of the arts and cultural assets.

## It may also be used for other purposes, among them:

To justify increased emphasis on creative economy career paths through technical and university institution.

To develop marketing and branding to promote creative assets both to businesses and as cultural tourism.

To leverage the creative industries to increase the competitiveness of other businesses where innovation in design and aesthetic content are critical to market share.

To develop a support and networking structure that includes convening leadership and building collaborative connections across industries.

To develop strategies for attracting and retaining creative talent.

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# NOTES ON METHODOLOGY AND DATA

In 2013, the Otis College of Art and Design commissioned the LAEDC to undertake the first comprehensive analysis of the creative economy of California and to evaluate its contribution to the overall state economy. This is the second edition of that report.

**The data collected for this report includes employment, the number of establishments, payroll activity, and other measures for all the creative economy's component sectors in California, which come from the following sources:**

- U.S. Bureau of the Census
- U.S. Bureau of Labor Statistics
- California Employment Development Department
- California Department of Education
- Internal Revenue Service

Much of the industry-level information in this report comes directly from the California Employment Development Department's [Quarterly Census of Employment and Wages](#) (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 source is the best available for employment and wage information.

The IMPLAN model was used 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.

**Note:** Statistical information contained herein has been obtained from sources believed to be reliable but such accuracy cannot be guaranteed.

# STATISTICAL APPENDIX

**TABLE 10:**  
**Economic Contribution of California's**  
**Creative Industries, 2013**

Industry	Establishments	Jobs	Payroll (\$billions)	Nonemployer Estab. (2011)	Total (Direct, Indirect, Induced) Contribution			
					Output (\$billions)	Total Jobs	Labor Income (\$billions)	Taxes* (\$millions)
Architecture/Interior Design	5,669	37,400	\$2.8	17,406	\$9.4	65,600	\$4.4	\$356.4
Art Galleries	615	2,200	\$0.1	2,373	\$0.2	2,900	0.1	\$24.6
Communication Arts	5,689	44,200	\$3.7	81,391	\$11.8	71,600	5.2	\$511.8
Digital Media	1,178	53,500	\$8.8	---	\$53.2	212,300	17.4	\$1,626.1
Entertainment	7,656	164,000	\$16.6	30,152	\$76.9	332,600	25.8	\$2,327.0
Fashion	9,132	120,100	\$5.1	14,397	\$40.0	206,400	10.3	\$2,413.2
Furniture/Decorative Arts	4,361	68,600	\$3.2	5,084	\$23.8	119,200	6.2	\$1,250.6
Product/Industrial Design	313	2,100	\$0.2	---	\$0.5	3,600	0.3	\$25.8
Publishing and Printing	6,729	131,200	\$23.4	15,682	\$59.4	308,000	33.3	\$2,532.7
Toys	465	7,400	\$0.8	1,154	\$4.0	14,900	1.2	\$279.7
Visual and Performing Arts	10,768	53,900	\$6.6	148,744	\$13.6	97,200	8.9	\$671.8
Fine & Performing Arts Schools	1,293	10,400	\$0.3	---	\$1.0	13,100	0.4	\$39.2
<b>Total</b>	<b>53,868</b>	<b>694,900</b>	<b>\$71.4</b>	<b>316,383</b>	<b>\$293.8</b>	<b>1,447,100</b>	<b>\$113.5</b>	<b>\$12,059.0</b>

**Source:** California EDD, QCEW data; Bureau of the Census; indirect contributions estimated by LAEDC

\* Property, state and local personal income taxes and sales taxes generated by earnings and spending of the direct and indirect workers. Details may not add to totals due to rounding.

**TABLE 11:**  
Creative Industries Employment, 2008 – 2013

Creative Industry	NAICS Code	Avg. Number of Jobs (1,000s)		2008-2013 Change	
		2008	2013	Number	Percent
<b>Architecture and Interior Design:</b>		<b>49.3</b>	<b>37.4</b>	<b>-12.0</b>	<b>-24.2%</b>
<i>Architectural Services</i>	54131	30.1	22.9	-7.2	-24.0%
<i>Landscape Design</i>	54132	8.2	5.7	-2.4	-29.8%
<i>Drafting Services</i>	54134	0.9	0.6	-0.3	-31.8%
<i>Interior Design</i>	54141	6.4	5.2	-1.2	-18.7%
<i>Ornamental &amp; Architectural Metal Work Mfg.</i>	332323	3.8	2.9	-0.8	-22.0%
<b>Art Galleries:</b>	45392	<b>3.6</b>	<b>2.2</b>	<b>-1.4</b>	<b>-37.7%</b>
<b>Communication Arts:</b>		<b>46.0</b>	<b>44.2</b>	<b>-1.9</b>	<b>-4.1%</b>
<i>Graphic Design</i>	54143	13.4	10.2	-3.2	-24.0%
<i>Advertising Agencies</i>	54181	24.1	27.2	3.1	12.9%
<i>Photography Studios, Portrait</i>	541921	7.0	5.4	-1.6	-22.5%
<i>Commercial Photography</i>	541922	1.5	1.3	-0.2	-13.1%
<b>Digital Media:</b>		<b>43.2</b>	<b>53.5</b>	<b>10.2</b>	<b>23.6%</b>
<i>Software Publishers</i>	5112	43.2	53.5	10.2	23.6%
<b>Entertainment:</b>		<b>179.5</b>	<b>164.0</b>	<b>-15.5</b>	<b>-8.6%</b>
<i>Motion Picture/Video Production</i>	51211	117.3	108.7	-8.6	-7.3%
<i>Motion Picture Distribution</i>	51212	2.3	2.0	-0.2	-10.6%
<i>Post-Production Services</i>	51219	11.5	10.4	-1.1	-9.4%
<i>Sound Recording</i>	5122	4.3	3.4	-0.9	-20.1%
<i>Radio Stations</i>	515112	7.6	6.8	-0.8	-10.8%
<i>Television Broadcasting</i>	515120	16.8	19.0	2.2	13.0%
<i>Cable Broadcasting</i>	5152	19.8	13.7	-6.1	-30.9%
<b>Fashion:</b>		<b>135.3</b>	<b>120.1</b>	<b>-15.2</b>	<b>-11.3%</b>
<i>Textile Mills Manufacturing</i>	313	11.0	8.8	-2.2	-19.9%
<i>Apparel Manufacturing</i>	315	70.7	56.8	-13.9	-19.6%
<i>Apparel Wholesaling</i>	4243	30.5	34.6	4.1	13.5%
<i>Footwear Manufacturing</i>	3162	1.1	0.9	-0.3	-24.3%
<i>Footwear Wholesaling</i>	42434	5.4	5.7	0.3	5.5%
<i>Women's Handbag Manufacturing</i>	316992	0.1	0.1	0.0	2.0%
<i>Cosmetics Manufacturing</i>	32562	6.7	6.6	-0.1	-1.0%
<i>Jewelry Manufacturing</i>	33991	3.6	2.8	-0.8	-21.7%
<i>Jewelry Wholesaling</i>	42394	6.3	6.5	0.2	3.4%
<i>Other Specialized Design Svc</i>	54149	5.3	2.9	-2.4	-44.8%
<b>Furniture and Decorative Arts:</b>		<b>89.9</b>	<b>68.6</b>	<b>-21.3</b>	<b>-23.7%</b>
<i>Textile Product Mills</i>	314	12.2	8.7	-3.6	-29.3%
<i>Furniture Manufacturing</i>	337	45.7	32.3	-13.4	-29.4%
<i>Furniture Wholesaling</i>	4232	20.1	19.3	-0.7	-3.7%
<i>Electric Lighting Fixtures</i>	33512	8.4	6.5	-1.9	-22.6%
<i>China Plumbing Fixtures, China, Earthenware</i>	327111	0.0	0.0	0.0	---
<i>Other China, Fine Earthenware &amp; Pottery Mfg.</i>	327112	1.0	0.0	-1.0	---
<i>Pressed &amp; Blown Glass &amp; Glassware Mfg.</i>	327212	1.0	0.6	-0.3	-35.5%
<i>Other Misc. Nonmetallic Mineral Product Mfg.</i>	327999	1.6	1.3	-0.3	-21.6%
<b>Product/Industrial Design:</b>	54142	<b>3.0</b>	<b>2.1</b>	<b>-0.9</b>	<b>-29.6%</b>
<b>Publishing and Printing:</b>		<b>133.0</b>	<b>131.2</b>	<b>-1.8</b>	<b>-1.4%</b>
<i>Printing and Related Support Activities</i>	3231	46.2	37.4	-8.8	-19.1%
<i>Book, Periodical, Newspaper Wholesalers</i>	424920	5.7	4.1	-1.6	-28.2%
<i>Newspaper Publishers</i>	511110	25.0	14.8	-10.2	-40.9%
<i>Periodical Publishers</i>	511120	13.5	9.3	-4.2	-31.2%
<i>Book Publishers</i>	511130	8.5	6.1	-2.4	-28.4%
<i>Greeting Card Publishers</i>	511191	0.1	0.1	-0.1	-53.3%
<i>All Other Publishers</i>	511199	1.6	1.3	-0.3	-20.3%
<i>Libraries and Archives</i>	519120	1.9	2.1	0.2	8.6%
<i>Internet Publishing &amp; Broadcasting</i>	519130	30.4	56.1	25.7	84.4%
<b>Toys:</b>		<b>9.8</b>	<b>7.4</b>	<b>-2.4</b>	<b>-24.6%</b>
<i>Toy Manufacturing</i>	33993	3.7	2.5	-1.1	-31.2%
<i>Toy Wholesaling</i>	42392	6.1	4.8	-1.3	-20.7%
<b>Visual and Performing Arts Providers:</b>		<b>51.6</b>	<b>53.9</b>	<b>2.3</b>	<b>4.4%</b>
<i>Theater Companies</i>	71111	7.3	6.8	-0.4	-6.1%
<i>Dance Companies</i>	71112	1.2	1.1	-0.2	-14.8%
<i>Musical Groups</i>	71113	6.4	5.6	-0.9	-13.6%
<i>Other Performing Arts Cos.</i>	71119	0.3	0.4	0.1	35.0%
<i>Agents &amp; Managers of Artists, etc.</i>	71141	7.0	8.4	1.4	19.6%
<i>Independent Artists, Writers, etc.</i>	71151	17.0	18.2	1.2	7.3%
<i>Museums</i>	71211	9.1	10.5	1.4	15.2%
<i>Musical Instrument Manufacturing</i>	339992	3.3	3.0	-0.3	-10.3%
<b>Fine and Performing Arts Schools:</b>		<b>8.9</b>	<b>10.4</b>	<b>1.5</b>	<b>16.9%</b>
<i>Fine and Performing Arts Schools</i>	61161	8.9	10.4	1.5	16.9%
<b>TOTAL</b>		<b>753.3</b>	<b>694.9</b>	<b>-58.4</b>	<b>-7.8%</b>

Source: California EDD, Labor Market Information Division, QCEW data

**TABLE 12:**  
**Creative Industries Employment Year-to-Year**  
**Comparisons, 2008 – 2013**

Creative Industry	NAICS Code	2008-2013							2008-2013						
		2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013		
<b>Architecture and Interior Design:</b>		<b>49.3</b>	<b>38.8</b>	<b>35.1</b>	<b>35.2</b>	<b>36.7</b>	<b>37.4</b>	<b>-5.6%</b>	<b>-21.4%</b>	<b>-9.4%</b>	<b>0.2%</b>	<b>4.1%</b>	<b>1.9%</b>		
<i>Architectural Services</i>	54131	30.1	23.6	21.6	21.8	22.4	22.9	-3.0%	-21.5%	-8.4%	0.6%	2.9%	2.1%		
<i>Landscape Design</i>	54132	8.2	6.1	5.4	5.6	5.9	5.7	-11.1%	-25.8%	-10.1%	2.7%	5.5%	-2.9%		
<i>Drafting Services</i>	541340	0.9	0.8	0.8	0.7	0.6	0.6	-9.0%	-17.4%	-1.5%	-13.6%	-2.7%	-0.2%		
<i>Interior Design</i>	54141	6.4	5.0	4.3	4.4	4.7	5.2	-7.8%	-22.1%	-13.5%	1.9%	6.2%	11.5%		
<i>Ornamental &amp; Architectural Metal Work Mfg.</i>	332323	3.8	3.4	3.0	2.8	3.1	2.9	-8.6%	-10.6%	-10.9%	-6.5%	9.4%	-4.3%		
<b>Art Galleries</b>	45392	<b>3.6</b>	<b>3.0</b>	<b>2.1</b>	<b>2.0</b>	<b>2.2</b>	<b>2.2</b>	<b>-13.3%</b>	<b>-16.8%</b>	<b>-31.1%</b>	<b>-2.4%</b>	<b>8.0%</b>	<b>3.0%</b>		
<b>Communication Arts:</b>		<b>46.0</b>	<b>40.6</b>	<b>39.4</b>	<b>41.3</b>	<b>43.4</b>	<b>44.2</b>	<b>-1.4%</b>	<b>-11.8%</b>	<b>-2.9%</b>	<b>4.8%</b>	<b>5.0%</b>	<b>1.8%</b>		
<i>Graphic Design</i>	54143	13.4	10.8	10.1	10.3	10.3	10.2	-5.2%	-19.2%	-6.3%	1.3%	0.3%	-1.3%		
<i>Advertising Agencies</i>	54181	24.1	22.1	21.9	23.9	25.9	27.2	0.8%	-8.4%	-1.1%	9.2%	8.6%	5.0%		
<i>Photography Studios, Portrait</i>	541921	7.0	6.4	6.2	6.0	6.0	5.4	-1.8%	-8.5%	-3.5%	-2.6%	-1.2%	-8.7%		
<i>Commercial Photography</i>	541922	1.5	1.3	1.2	1.1	1.2	1.3	2.9%	-15.7%	-3.1%	-6.2%	2.3%	10.9%		
<b>Digital Media:</b>		<b>43.2</b>	<b>44.3</b>	<b>44.7</b>	<b>47.3</b>	<b>51.2</b>	<b>53.5</b>	<b>0.8%</b>	<b>2.5%</b>	<b>0.8%</b>	<b>5.8%</b>	<b>8.2%</b>	<b>4.5%</b>		
<i>Software Publishers</i>	5112	43.2	44.3	44.7	47.3	51.2	53.5	0.8%	2.5%	0.8%	5.8%	8.2%	4.5%		
<b>Entertainment:</b>		<b>179.5</b>	<b>164.8</b>	<b>166.4</b>	<b>165.9</b>	<b>165.0</b>	<b>164.0</b>	<b>1.0%</b>	<b>-8.2%</b>	<b>1.0%</b>	<b>-0.3%</b>	<b>-0.5%</b>	<b>-0.6%</b>		
<i>Motion Picture/Video Production</i>	51211	117.3	105.1	107.7	108.2	107.4	108.7	3.4%	-10.4%	2.4%	0.5%	-0.8%	1.2%		
<i>Motion Picture Distribution</i>	51212	2.3	2.5	2.3	2.0	1.9	2.0	1.3%	10.3%	-6.3%	-13.4%	-5.9%	6.3%		
<i>Post Production Services</i>	51219	11.5	10.7	11.3	11.4	11.0	10.4	4.7%	-7.1%	5.5%	1.0%	-3.3%	-5.3%		
<i>Sound Recording</i>	5122	4.3	4.0	3.9	4.0	4.1	3.4	-31.8%	-7.3%	-1.4%	2.6%	1.4%	-16.0%		
<i>Radio Stations</i>	515112	7.6	6.9	6.9	7.0	6.9	6.8	-2.7%	-8.8%	-0.4%	1.1%	-0.9%	-2.0%		
<i>Television Broadcasting</i>	515120	16.8	15.8	17.1	17.9	18.1	19.0	4.6%	-6.1%	8.7%	4.3%	1.1%	5.0%		
<i>Cable Broadcasting</i>	5152	<b>19.8</b>	<b>19.9</b>	<b>17.2</b>	<b>15.4</b>	<b>15.7</b>	<b>13.7</b>	<b>-5.3%</b>	<b>0.3%</b>	<b>-13.4%</b>	<b>-10.5%</b>	<b>1.7%</b>	<b>-12.7%</b>		
<b>Fashion:</b>		<b>135.3</b>	<b>119.8</b>	<b>115.9</b>	<b>114.9</b>	<b>116.7</b>	<b>120.1</b>	<b>-2.1%</b>	<b>-11.4%</b>	<b>-3.2%</b>	<b>-0.9%</b>	<b>1.6%</b>	<b>2.9%</b>		
<i>Textile Mills Manufacturing</i>	313	11.0	9.6	9.0	9.0	8.7	8.8	-2.9%	-12.8%	-6.4%	-0.4%	-3.0%	1.5%		
<i>Apparel Manufacturing</i>	315	70.7	60.5	58.7	56.3	56.6	56.8	-4.7%	-14.4%	-2.9%	-4.2%	0.6%	0.4%		
<i>Apparel Wholesaling</i>	4243	30.5	28.8	30.5	31.1	32.2	34.6	2.5%	-5.7%	6.1%	1.8%	3.7%	7.4%		
<i>Footwear Manufacturing</i>	3162	1.1	0.9	0.9	1.0	1.0	0.9	-5.3%	-23.8%	-0.7%	18.6%	-3.4%	-12.8%		
<i>Footwear Wholesaling</i>	42434	5.4	5.1	5.4	5.3	5.5	5.7	2.7%	-6.8%	6.0%	-0.4%	3.6%	3.7%		
<i>Women's Handbag Manufacturing</i>	316992	0.1	0.1	0.1	0.1	0.1	0.1	22.9%	-15.7%	18.6%	-2.9%	-16.2%	25.3%		
<i>Cosmetics Manufacturing</i>	32562	6.7	6.0	5.8	6.0	6.4	6.6	0.9%	-10.5%	-2.5%	3.3%	6.3%	3.3%		
<i>Jewelry Manufacturing</i>	33991	3.6	3.0	2.6	2.7	2.7	2.8	-6.6%	-16.6%	-12.0%	1.6%	1.2%	3.7%		
<i>Jewelry Wholesaling</i>	42394	6.3	5.8	5.7	6.1	6.4	6.5	-7.5%	-8.9%	-0.3%	6.5%	4.0%	2.7%		
<i>Other Specialized Design Svc</i>	54149	5.3	5.3	2.5	2.7	2.7	2.9	21.9%	-0.3%	-52.1%	6.4%	-0.4%	9.0%		
<b>Furniture &amp; Decorative Arts:</b>		<b>89.9</b>	<b>71.9</b>	<b>66.8</b>	<b>65.0</b>	<b>65.8</b>	<b>68.6</b>	<b>-8.7%</b>	<b>-20.1%</b>	<b>-7.1%</b>	<b>-2.6%</b>	<b>1.3%</b>	<b>4.2%</b>		
<i>Textile Product Mills</i>	314	12.2	10.3	9.5	8.5	8.3	8.7	-4.3%	-16.0%	-8.0%	-10.1%	-2.2%	4.1%		
<i>Furniture Manufacturing</i>	337	45.7	34.4	31.3	31.1	31.1	32.3	-12.3%	-24.8%	-8.9%	-0.6%	0.1%	3.6%		
<i>Furniture Wholesaling</i>	4232	20.1	17.3	16.7	17.2	18.2	19.3	-5.3%	-14.0%	-3.1%	3.0%	5.8%	6.0%		
<i>Electric Lighting Fixtures</i>	33512	8.4	6.9	6.4	6.3	6.3	6.5	2.9%	-17.6%	-6.6%	-2.4%	0.3%	2.6%		
<i>China Plumbing Fixtures, China, Earthenware</i>	327111	0.0	0.1	0.0	---	---	---	-23.5%	438.5%	-30.0%	---	---	---		
<i>Other China, Fine Earthenware &amp; Pottery Mfg.</i>	327112	1.0	0.8	0.7	---	---	---	-18.3%	-23.7%	-8.3%	---	---	---		
<i>Pressed &amp; Blown Glass &amp; Glassware Mfg.</i>	327212	1.0	0.8	0.8	0.7	0.7	0.6	-2.1%	-21.2%	0.1%	-11.5%	-3.8%	-4.0%		
<i>Other Misc. Nonmetallic Mineral Product Mfg.</i>	327999	1.6	1.5	1.3	1.2	1.2	1.3	-21.5%	-9.2%	-11.9%	-5.9%	-1.1%	5.4%		
<b>Product/Industrial Design</b>	54142	<b>3.0</b>	<b>2.4</b>	<b>2.3</b>	<b>2.3</b>	<b>1.9</b>	<b>2.1</b>	<b>6.2%</b>	<b>-22.1%</b>	<b>-4.6%</b>	<b>1.7%</b>	<b>-17.6%</b>	<b>12.9%</b>		
<b>Publishing and Printing:</b>		<b>133.0</b>	<b>120.6</b>	<b>114.4</b>	<b>118.6</b>	<b>121.4</b>	<b>131.2</b>	<b>-0.7%</b>	<b>-9.3%</b>	<b>-5.1%</b>	<b>3.6%</b>	<b>2.4%</b>	<b>8.0%</b>		
<i>Printing and Related Support Activities</i>	3231	46.2	40.6	37.9	39.3	38.7	37.4	-4.8%	-12.0%	-6.7%	3.6%	-1.4%	-3.6%		
<i>Book, Periodical, Newspaper Wholesalers</i>	424920	5.7	5.5	4.7	4.5	4.2	4.1	8.6%	-3.3%	-15.3%	-4.3%	-6.5%	-2.0%		
<i>Newspaper Publishers</i>	511110	25.0	20.1	17.7	16.6	15.5	14.8	-9.2%	-19.4%	-12.0%	-6.4%	-6.5%	-4.8%		
<i>Periodical Publishers</i>	511120	13.5	11.8	10.9	9.8	9.7	9.3	-5.0%	-13.0%	-7.7%	-9.6%	-1.7%	-3.6%		
<i>Book Publishers</i>	511130	8.5	7.7	6.4	6.2	6.0	6.1	0.1%	-9.5%	-17.1%	-2.6%	-3.9%	1.9%		
<i>Greeting Card Publishers</i>	511191	0.1	0.1	0.1	0.1	0.1	0.1	-5.6%	-35.6%	-28.7%	6.5%	-3.0%	-1.6%		
<i>All Other Publishers</i>	511199	1.6	1.4	1.1	1.2	1.2	1.3	-10.0%	-12.8%	-18.4%	6.6%	3.9%	1.1%		
<i>Libraries and Archives</i>	519120	1.9	1.8	1.9	1.7	1.8	2.1	1.6%	-4.1%	3.1%	-8.3%	0.4%	19.2%		
<i>Internet Publishing &amp; Broadcasting</i>	519130	30.4	31.5	33.8	39.1	44.3	56.1	16.7%	3.6%	7.0%	16.0%	13.1%	26.8%		
<b>Toys:</b>		<b>9.8</b>	<b>8.0</b>	<b>7.4</b>	<b>6.9</b>	<b>7.1</b>	<b>7.4</b>	<b>-0.6%</b>	<b>-18.3%</b>	<b>-7.3%</b>	<b>-6.1%</b>	<b>1.9%</b>	<b>4.0%</b>		
<i>Toy Manufacturing</i>	33993	3.7	2.7	2.4	2.2	2.4	2.5	2.2%	-25.0%	-11.5%	-7.4%	5.2%	6.3%		
<i>Toy Wholesaling</i>	42392	6.1	5.2	5.0	4.7	4.7	4.8	-2.1%	-14.3%	-5.2%	-5.4%	0.3%	2.8%		
<b>Visual and Performing Arts Providers:</b>		<b>51.6</b>	<b>48.9</b>	<b>48.5</b>	<b>51.0</b>	<b>52.1</b>	<b>53.9</b>	<b>0.0%</b>	<b>-5.3%</b>	<b>-0.9%</b>	<b>5.3%</b>	<b>2.0%</b>	<b>3.5%</b>		
<i>Theater Companies</i>	71111	7.3	6.7	6.5	6.8	6.8	6.8	10.7%	-7.9%	-2.7%	4.3%	0.4%	0.1%		
<i>Dance Companies</i>	71112	1.2	1.1	0.9	1.0	0.9	1.1	7.1%	-11.6%	-13.6%	0.8%	-0.9%	11.7%		
<i>Musical Groups</i>	71113	6.4	6.0	5.6	5.5	5.6	5.6	-6.4%	-7.0%	-6.5%	-1.6%	0.9%	0.0%		
<i>Other Performing Arts Cos.</i>	71119	0.3	0.3	0.4	0.6	0.4	0.4	17.6%	19.7%	29.6%	51.8%	-40.0%	-4.4%		
<i>Agents &amp; Managers of Artists, etc.</i>	71141	7.0	7.2	7.1	7.5	7.9	8.4	-9.6%	1.7%	-0.9%	5.6%	5.3%	6.7%		
<i>Independent Artists, Writers, etc.</i>	71151	17.0	15.7	16.0	17.2	17.4	18.2	0.0%	-7.4%	1.7%	7.9%	1.1%	4.7%		
<i>Museums</i>	71211	9.1	9.0	9.1	9.6	10.0	10.5	5.2%	-0.7%	1.4%	4.5%	5.1%	4.1%		
<i>Musical Instrument Manufacturing</i>	339992	3.3	2.9	2.8	2.8	3.0	3.0	-3.3%	-12.8%	-4.5%	2.6%	5.4%	-0.4%		
<b>Fine and Performing Arts Schools</b>		<b>8.9</b>	<b>8.8</b>	<b>9.1</b>	<b>9.6</b>	<b>9.9</b>	<b>10.4</b>	<b>2.3%</b>	<b>-0.7%</b>	<b>2.5%</b>	<b>6.0%</b>	<b>3.4%</b>	<b>4.8%</b>		
<i>Fine and Performing Arts Schools</i>	61161	8.9	8.8	9.1	9.6	9.9	10.4	2.3%	-0.7%	2.5%	6.0%	3.4%	4.8%		
<b>TOTAL</b>		<b>753.3</b>	<b>671.9</b>	<b>652.0</b>	<b>660.1</b>	<b>673.3</b>	<b>694.9</b>	<b>-1.8%</b>	<b>-10.8%</b>	<b>-3.0%</b>	<b>1.2%</b>	<b>2.0%</b>	<b>3.2%</b>		

Source: California EDD, LMID, QCEW Series



**TABLE 13:**  
**Employment by Creative Occupation, 2008-1013**

Occupational Title	SOC Code	Average Employment		2008-2013 Changes		Median Annual Wage 2013	Location Quotient	Entry Level Education
		2008	2013	Number	Percent			
<b>Management Occupations:</b>		<b>42,030</b>	<b>40,400</b>	<b>-1,630</b>	<b>-3.9%</b>			
<i>Advertising and Promotions Managers</i>	11-2011	4,770	4,050	-720	-15.1%	\$109,680	1.28	Bachelor's Degree
<i>Marketing Managers</i>	11-2021	31,340	29,960	-1,380	-4.4%	\$142,850	1.55	Bachelor's Degree
<i>Public Relations and Fundraising Managers</i>	11-2031	5,920	6,390	470	7.9%	\$100,140	1.07	Bachelor's Degree
<b>Business and Financial Operations Occupations:</b>		<b>3,580</b>	<b>4,040</b>	<b>460</b>	<b>12.8%</b>			
<i>Agents and Business Managers of Artists, etc.</i>	13-1011	3,580	4,040	460	12.8%	\$85,770	3.11	Bachelor's Degree
<b>Computer and Mathematical Occupations:</b>		<b>**</b>	<b>174,500</b>	<b>---</b>	<b>---</b>			
<i>Software Developers, Applications</i>	15-1132	**	95,510	---	---	\$107,870	1.34	Bachelor's Degree
<i>Software Developers, System Software</i>	15-1133	**	78,990	---	---	\$117,040	1.91	Bachelor's Degree
<b>Architecture and Engineering Occupations:</b>		<b>34,380</b>	<b>24,720</b>	<b>-9,660</b>	<b>-28.1%</b>			
<i>Architects, Except Landscape and Naval</i>	17-1011	12,170	10,340	-1,830	-15.0%	\$85,940	1.11	Bachelor's Degree
<i>Landscape Architects</i>	17-1012	3,840	2,520	-1,320	-34.4%	\$77,190	1.39	Bachelor's Degree
<i>Architectural and Civil Drafters</i>	17-3011	18,370	11,860	-6,510	-35.4%	\$56,150	1.20	Associate Degree
<b>Education, Training and Library Operations:</b>		<b>50,370</b>	<b>51,490</b>	<b>1,120</b>	<b>2.2%</b>			
<i>Architecture Teachers, Postsecondary</i>	25-1031	620	**	---	---	\$71,570	*	Doctoral/Professional Degree
<i>Anthropology and Archeology Teachers, Postsecondary</i>	25-1061	590	520	-70	-11.9%	\$86,050	0.79	Doctoral/Professional Degree
<i>Area, Ethnic and Cultural Studies Teachers, Postsecondary</i>	25-1062	650	730	80	12.3%	\$67,120	0.67	Doctoral/Professional Degree
<i>Library Science Teachers, Postsecondary</i>	25-1082	260	240	-20	-7.7%	\$95,270	0.47	Doctoral/Professional Degree
<i>Art, Drama and Music Teachers, Postsecondary</i>	25-1121	9,930	11,380	1,450	14.6%	\$70,270	1.10	Doctoral/Professional Degree
<i>Communications Teachers, Postsecondary</i>	25-1122	2,400	3,090	690	28.8%	\$82,990	0.93	Doctoral/Professional Degree
<i>English Language and Literature Teachers, Postsecondary</i>	25-1123	7,130	7,250	120	1.7%	\$74,220	0.87	Doctoral/Professional Degree
<i>Foreign Language and Literature Teachers, Postsecondary</i>	25-1124	2,950	3,690	740	25.1%	\$68,450	1.09	Doctoral/Professional Degree
<i>History Teachers, Postsecondary</i>	25-1125	1,640	1,700	60	3.7%	\$81,690	0.65	Doctoral/Professional Degree
<i>Archivists</i>	25-4011	310	530	220	71.0%	\$51,000	0.86	---
<i>Curators</i>	25-4012	1,090	910	-180	-16.5%	\$65,630	0.75	Masters Degree
<i>Museum Technicians and Conservators</i>	25-4013	980	1,150	170	17.3%	\$44,060	1.05	Bachelor's Degree
<i>Librarians</i>	25-4021	9,750	9,210	-540	-5.5%	\$69,900	0.61	Masters Degree
<i>Library Technicians</i>	25-4031	11,510	9,940	-1,570	-13.6%	\$40,880	0.93	Post Secondary/Non-degree Award
<i>Audio-Visual and Multimedia Collections Specialists</i>	25-9011	560	1,150	590	105.4%	\$43,290	1.18	Bachelor's Degree
<b>Art, Design, Entertainment and Media Occupations:</b>		<b>241,910</b>	<b>253,610</b>	<b>11,700</b>	<b>4.8%</b>			
<i>Art Directors</i>	27-1011	7,340	5,900	-1,440	-19.6%	\$100,100	1.65	Bachelor's Degree
<i>Craft Artists</i>	27-1012	610	640	30	4.9%	\$53,410	1.21	HS Diploma or Equivalent
<i>Fine Artists, Including Painters, Sculptors and Illustrators</i>	27-1013	1,040	2,990	1,950	187.5%	\$53,500	2.25	HS Diploma or Equivalent
<i>Multimedia Artists and Animators</i>	27-1014	10,510	10,300	-210	-2.0%	\$81,290	3.01	Bachelor's Degree
<i>Artists and Related Workers, All Other</i>	27-1019	**	550	---	---	\$51,850	0.66	HS Diploma or Equivalent
<i>Commercial and Industrial Designers</i>	27-1021	3,620	3,660	40	1.1%	\$64,350	1.16	Bachelor's Degree
<i>Fashion Designers</i>	27-1022	3,900	5,720	1,820	46.7%	\$64,770	2.97	HS Diploma or Equivalent
<i>Floral Designers</i>	27-1023	4,750	3,190	-1,560	-32.8%	\$28,520	0.62	HS Diploma or Equivalent
<i>Graphic Designers</i>	27-1024	30,340	26,290	-4,050	-13.3%	\$52,010	1.22	Bachelor's Degree
<i>Interior Designers</i>	27-1025	6,500	6,200	-300	-4.6%	\$57,790	1.28	Bachelor's Degree
<i>Merchandise Displayers and Window Trimmers</i>	27-1026	9,330	6,810	-2,520	-27.0%	\$31,600	0.84	HS Diploma or Equivalent
<i>Set and Exhibit Designers</i>	27-1027	1,660	2,340	680	41.0%	\$49,580	2.16	Bachelor's Degree
<i>Designers, All Other</i>	27-1029	2,250	1,550	-700	-31.1%	\$47,590	1.90	Bachelor's Degree
<i>Actors</i>	27-2011	15,870	31,450	15,580	98.2%	*	4.48	---
<i>Producers and Directors</i>	27-2012	19,310	25,440	6,130	31.7%	\$93,750	2.48	Bachelor's Degree
<i>Dancers</i>	27-2031	1,580	1,680	100	6.3%	*	1.31	HS Diploma or Equivalent
<i>Choreographers</i>	27-2032	2,360	1,560	-800	-33.9%	\$56,160	2.23	HS Diploma or Equivalent
<i>Music Directors and Composers</i>	27-2041	1,610	2,480	870	54.0%	\$56,260	0.96	Bachelor's Degree
<i>Musicians and Singers</i>	27-2042	8,700	6,470	-2,230	-25.6%	*	1.49	HS Diploma or Equivalent
<i>Radio and Television Announcers</i>	27-3011	3,110	2,750	-360	-11.6%	\$35,610	0.81	Bachelor's Degree
<i>Public Address System and other Announcers</i>	27-3012	880	1,350	470	53.4%	\$25,330	1.63	HS Diploma or Equivalent
<i>Broadcast News Analysts</i>	27-3021	620	630	10	1.6%	\$73,320	1.17	---
<i>Reporters and Correspondents</i>	27-3022	5,370	4,590	-780	-14.5%	\$40,560	0.95	Associate Degree
<i>Public Relations Specialists</i>	27-3031	28,840	21,730	-7,110	-24.7%	\$62,860	0.97	Bachelor's Degree
<i>Editors</i>	27-3041	12,420	10,720	-1,700	-13.7%	\$58,590	0.98	Bachelor's Degree
<i>Technical Writers</i>	27-3042	6,760	6,660	-100	-1.5%	\$80,710	1.27	Bachelor's Degree
<i>Writers and Authors</i>	27-3043	6,930	7,770	840	12.1%	\$79,140	1.61	Bachelor's Degree
<i>Media and Communication Workers, All Other</i>	27-3099	5,040	12,140	7,100	140.9%	\$48,370	4.20	HS Diploma or Equivalent
<i>Audio and Video Equipment Technicians</i>	27-4011	8,670	9,520	850	9.8%	\$47,730	1.52	Post Secondary/Non-degree Award
<i>Broadcast Technicians</i>	27-4012	3,810	4,550	740	19.4%	\$41,700	1.47	Associate Degree
<i>Radio Operators</i>	27-4013	**	**	---	---	*	*	---

Source: California EDD, LMD, QCEW Series

Continued on next page »

**TABLE 13:**  
**Employment by Creative Occupation, 2008-1013**

« Continued from previous page

Occupational Title	SOC Code	Average Employment		2008-2013 Changes		Median Annual Wage 2013	Location Quotient	Entry Level Education
		2008	2013	Number	Percent			
<i>Sound Engineering Technicians</i>	27-4014	5030	3,690	-1,340	-26.6%	\$67,470	2.47	Post Secondary/Non-degree Award
<i>Photographers</i>	27-4021	5670	5,720	50	0.9%	\$38,520	0.94	HS Diploma or Equivalent
<i>Camera Operators, Television, Video, and Motion Picture</i>	27-4031	4500	2,970	-1,530	-34.0%	\$49,630	1.59	Bachelor's Degree
<i>Film and Video Editors</i>	27-4032	6890	7,970	1,080	15.7%	\$78,660	3.28	Bachelor's Degree
<i>Media and Communication Equipment Workers, All Other</i>	27-4099	6090	5,630	-460	-7.6%	\$67,860	3.16	Bachelor's Degree
<b>Personal Care and Service Occupations:</b>		<b>3,100</b>	<b>3,480</b>	<b>380</b>	<b>12.3%</b>			
<i>Motion Picture Projectionists</i>	39-3021	1480	940	-540	-36.5%	\$20,360	1.11	Less than High School
<i>Costume attendants</i>	39-3092	1260	1,640	380	30.2%	\$30,000	2.51	HS Diploma or Equivalent
<i>Makeup Artists, Theatrical and Performing</i>	39-5091	360	900	540	150.0%	\$76,700	3.33	---
<b>Sales and Related Occupations:</b>		<b>15,410</b>	<b>16,800</b>	<b>1,390</b>	<b>9.0%</b>			
<i>Advertising Sales Agents</i>	41-3011	15410	16,800	1,390	9.0%	\$51,570	1.02	HS Diploma or Equivalent
<b>Office and Administrative Support Occupations:</b>		<b>12,600</b>	<b>10,180</b>	<b>-2,420</b>	<b>-19.2%</b>			
<i>Library Assistants, Clerical</i>	43-4121	10350	8,930	-1,420	-13.7%	\$29,820	0.79	HS Diploma or Equivalent
<i>Desktop Publishers</i>	43-9031	2250	1,250	-1,000	-44.4%	\$49,890	0.78	Associate Degree
<b>Installation, Maintenance and Repair Occupations:</b>		<b>5,200</b>	<b>3,270</b>	<b>-1,930</b>	<b>-37.1%</b>			
<i>Electronic Home Entertainment Equip. Installers and Repairers</i>	49-2097	4020	2,080	-1,940	-48.3%	\$36,220	0.69	Post Secondary/Non-degree Award
<i>Camera and Photographic Equipment Repairers</i>	49-9061	620	520	-100	-16.1%	\$44,340	1.48	Associate Degree
<i>Musical Instrument Repairers and Tuners</i>	49-9063	250	520	270	108.0%	\$29,180	0.65	---
<i>Watch Repairers</i>	49-9064	310	150	-160	-51.6%	\$42,800	0.48	---
<b>Production Occupations:</b>		<b>33,280</b>	<b>24,230</b>	<b>-9,050</b>	<b>-27.2%</b>			
<i>Bindery Workers</i>	51-5011	4610	**	---	---	*	*	---
<i>Book binders</i>	51-5012	560	**	---	---	*	*	---
<i>Sewers, Hand</i>	51-6051	1100	850	-250	-22.7%	\$23,190	1.35	Less than High School
<i>Tailors, Dressmakers, and Custom Sewers</i>	51-6052	4220	3,450	-770	-18.2%	\$28,740	1.45	Less than High School
<i>Fabric and Apparel Pattermakers</i>	51-6092	2490	2,020	-470	-18.9%	\$52,520	3.00	HS Diploma or Equivalent
<i>Cabinetmakers and Bench Carpenters</i>	51-7011	13820	8,110	-5,710	-41.3%	\$32,730	0.88	HS Diploma or Equivalent
<i>Jewelers and Precious Stone and Metal Workers</i>	51-9071	3490	2,690	-800	-22.9%	\$34,000	1.06	HS Diploma or Equivalent
<i>Painting, Coating and Decorating Workers</i>	51-9123	1920	1,870	-50	-2.6%	\$30,870	1.05	HS Diploma or Equivalent
<i>Photographic Process Workers</i>	51-9151	**	4,460	---	---	\$31,090	1.08	HS Diploma or Equivalent
<i>Etchers and Engravers</i>	51-9194	1070	780	-290	-27.1%	\$29,050	0.82	HS Diploma or Equivalent
		<b>441,860</b>	<b>606,720</b>	<b>164,860</b>	<b>37.3%</b>			

**Notes:**

- \* Indicates that a wage or location quotient estimate are not available
- \*\* Indicates that an employment estimate is not available

**Source:**

California EDD, Labor Market Information Division, QCEW data

**TABLE 14:**  
California K-12 Creative Course Enrollment by Sex

Course Subject Area	Academic Year														
	2012-13			2011-12			2010-11			2008-09			2007-08		
	Female	Male	Total												
Art	285,684	281,600	567,284	282,214	280,598	562,812	301,116	301,539	602,655	282,898	289,250	572,148	290,988	301,066	592,054
Arts, Media and Entertainment	63,442	79,984	143,426	59,999	75,917	135,916	48,258	59,607	107,865	26,767	35,554	62,321	10,292	12,220	22,512
Building Trades and Construction	5,681	20,258	25,939	5,596	22,672	28,268	6,144	22,907	29,051	5,908	26,638	32,546	6,972	30,353	37,325
Computer Education	1,445	2,881	4,326	2,034	3,707	5,741	2,387	4,484	6,871	3,337	5,783	9,120	2,630	5,410	8,040
Consumer and Family Studies	3,614	492	4,106	4,734	727	5,461	4,492	785	5,277	6,304	1,030	7,334	7,416	1,055	8,471
Dance	38,245	5,788	44,033	39,948	46,856	86,804	39,939	6,194	46,133	34,019	5,382	39,401	36,316	5,194	41,510
Drama/Theater	67,834	48,371	116,205	71,444	52,629	124,073	75,767	56,907	132,674	77,237	58,722	135,959	78,605	60,848	139,453
Engineering and Design	6,639	19,482	26,121	6,800	21,616	28,416	5,610	18,679	24,289	5,174	17,698	22,872	4,155	15,385	19,540
English	54,024	48,001	102,025	60,571	54,288	114,859	61,750	54,601	116,351	58,431	49,705	108,136	52,070	45,179	97,249
Fashion and Interior Design	3,771	543	4,314	4,369	825	5,194	3,997	745	4,742	4,975	556	5,531	5,061	589	5,650
Fine and Performing Arts (IB)	1,441	912	2,353	1,369	864	2,233	1,559	1,074	2,633	1,390	963	2,353	1,145	778	1,923
Information Technology	2,497	4,679	7,176	2,724	4,482	7,206	2,102	3,495	5,597	—	—	0	—	—	0
Manufacturing and Product Development	1,627	3,801	5,428	1,954	4,661	6,615	1,750	4,052	5,802	1,329	4,383	5,712	8,857	16,523	25,380
Marketing Sales and Service	2,841	803	3,644	3,149	1,014	4,163	2,228	604	2,832	973	236	1,209	1,096	213	1,309
Music	248,640	230,881	479,521	264,782	245,456	510,238	240,859	231,382	472,241	240,242	232,968	473,210	243,022	230,256	473,278
<b>Creative Courses Totals:</b>	<b>787,425</b>	<b>748,476</b>	<b>1,535,901</b>	<b>811,687</b>	<b>816,312</b>	<b>1,627,999</b>	<b>797,958</b>	<b>767,055</b>	<b>1,565,013</b>	<b>748,984</b>	<b>728,868</b>	<b>1,477,852</b>	<b>748,625</b>	<b>725,069</b>	<b>1,473,694</b>
<b>All Courses Totals:</b>	<b>10,800,648</b>	<b>11,381,715</b>	<b>22,182,363</b>	<b>10,324,273</b>	<b>10,836,807</b>	<b>21,161,080</b>	<b>11,204,716</b>	<b>11,702,407</b>	<b>22,907,123</b>	<b>10,595,252</b>	<b>11,134,990</b>	<b>21,730,242</b>	<b>10,666,001</b>	<b>11,210,159</b>	<b>21,876,160</b>

Source: California Department of Education, *DataQuest*

**Notes:**

1. Course enrollments include only the number of K-12 public students enrolled in the class on "Information Day," a Wednesday in early October of the school year indicated.

2. Since this data is collected on a single day in Fall, courses that are only offered later in the year will not be included on this report.

3. Keep in mind that the course enrollment totals may be duplicating counts of students [a single student may be enrolled in more than our "Creative" course] and should not be mistaken as official enrollment.

4. The International Baccalaureate (IB) diploma Program is a two-year comprehensive and rigorous pre-university curriculum leading to an IB diploma. Successful IB candidates are typically granted advanced placement credit at the finest universities and colleges in the nation.

**TABLE 15:**  
California K-12 Creative Courses Meeting UC/CSU Requirements

Course Subject Area	2012-13		2011-12		2010-11		2008-09		2007-08	
	#Classes	#Classes Meeting UC/CSU Req'ts								
Art	23,924	14,612	25,304	14,065	24,234	14,305	20,200	12,738	21,088	13,145
Arts, Media and Entertainment	5,524	2,786	5,417	2,414	4,094	2,242	2,322	1,103	860	332
Building Trades and Construction	1,092	13	1,228	22	1,230	16	1,349	0	1,548	3
Computer Education	208	9	285	34	336	37	367	0	321	0
Consumer and Family Studies	173	6	233	22	225	6	290	16	320	13
Dance	1,584	861	1,685	895	1,608	951	1,267	679	1,343	737
Drama/Theater	4,412	2,492	4,816	2,620	4,880	2,784	4,844	2,711	5,063	2,790
Engineering and Design	1,080	339	1,196	332	993	219	957	100	820	10
English	4,707	2,773	5,003	2,627	5,113	2,870	4,344	2,563	4,000	2,187
Fashion and Interior Design	255	32	344	27	273	18	211	16	221	15
Fine and Performing Arts (IB)	136	125	152	125	163	134	105	97	100	90
Information Technology	265	87	266	80	207	68	—	—	—	—
Manufacturing and Product Development	227	110	281	129	258	135	227	105	994	315
Marketing Sales and Service	168	63	180	62	130	42	55	5	64	10
Music	15,460	5,977	17,877	6,390	15,354	5,989	14,441	5,516	14,595	5,629
<b>Creative Courses Totals:</b>	<b>59,215</b>	<b>30,285</b>	<b>64,267</b>	<b>29,844</b>	<b>59,098</b>	<b>29,816</b>	<b>50,979</b>	<b>25,649</b>	<b>51,337</b>	<b>25,276</b>
<b>All Courses Totals:</b>	<b>916,230</b>	<b>298,064</b>	<b>881,252</b>	<b>282,779</b>	<b>912,895</b>	<b>275,467</b>	<b>878,704</b>	<b>261,423</b>	<b>889,837</b>	<b>258,009</b>

Source: California Department of Education, *DataQuest*

**Notes:**

1. Course enrollments include only the number of K-12 public students enrolled in the class on "Information Day," a Wednesday in early October of the school year indicated.

2. Since this data is collected on a single day in Fall, courses that are only offered later in the year will not be included on this report.

3. Keep in mind that the course enrollment totals may be duplicating counts of students [a single student may be enrolled in more than our "Creative" course] and should not be mistaken as official enrollment.

4. The International Baccalaureate (IB) diploma Program is a two-year comprehensive and rigorous pre-university curriculum leading to an IB diploma. Successful IB candidates are typically granted advanced placement credit at the finest universities and colleges in the nation.



**TABLE 16:**  
**California K-12 Creative Courses Teachers**  
**and Class Size**

Course Subject Area	Academic Year									
	2012-13		2011-12		2010-11		2008-09		2007-08	
	#FTE Teachers	Ave Class Size	#FTE Teachers	Ave Class Size						
Art	3,814	23	3,657	23	3,890	22	3,874	27	3,918	26
Arts, Media and Entertainment	962	25	865	24	767	24	470	27	169	25
Building Trades and Construction	197	19	213	22	237	19	269	21	301	20
Computer Education	35	20	48	21	55	20	72	21	64	25
Consumer and Family Studies	29	20	39	22	40	24	61	27	64	28
Dance	269	27	276	25	293	25	254	29	252	29
Drama/Theater	800	25	825	24	892	24	982	26	973	26
Engineering and Design	187	24	207	25	182	24	195	23	163	21
English	769	23	835	24	864	23	848	25	778	24
Fashion and Interior Design	35	17	42	19	40	18	43	25	43	24
Fine and Performing Arts (IB)	23	17	24	14	27	14	20	18	17	16
Information Technology	52	27	49	27	41	26	—	—	—	—
Manufacturing and Product Development	35	26	45	23	46	25	44	24	197	26
Marketing Sales and Service	26	23	29	23	24	22	9	22	11	21
Music	2,911	27	3,279	23	2,929	22	2,934	25	2,914	24
<b>Creative Courses Totals:</b>	<b>10,143</b>	<b>23</b>	<b>10,433</b>	<b>23</b>	<b>10,327</b>	<b>22</b>	<b>10,076</b>	<b>24</b>	<b>9,863</b>	<b>24</b>
<b>All Courses Totals:</b>	<b>259,023</b>	<b>22</b>	<b>242,237</b>	<b>24</b>	<b>268,605</b>	<b>24</b>	<b>298,911</b>	<b>25</b>	<b>30,025</b>	<b>25</b>

**Source:** California Department of Education, *DataQuest*

**Notes:**

1. Course enrollments include only the number of K-12 public students enrolled in the class on "Information Day," a Wednesday in early October of the school year indicated.

2. Since this data is collected on a single day in Fall, courses that are only offered later in the year will not be included on this report.

3. Keep in mind that the course enrollment totals may be duplicating counts of students (a single student may be enrolled in more than our "Creative" course) and should not be mistaken as official enrollment.

4. The International Baccalaureate (IB) diploma Program is a two-year comprehensive and rigorous pre-university curriculum leading to an IB diploma. Successful IB candidates are typically granted advanced placement credit at the finest universities and colleges in the nation.

**TABLE 17:**  
**K-12 Creative Subject Areas and Courses**

<b>Art</b>	Set design and construction	Other engineering and design
Advertising design	Stage production	Other visual communications, drafting course
AP Art History	Stage technology	Principles of engineering and design technology
AP Studio art: drawing	Technical theater	Technical drafting
AP Studio art: three dimensional	Television production	Technical illustration
AP Studio art: two dimensional	Three-dimensional design	
Art appreciation (elem sch std)	Two-dimensional design	<b>English</b>
Art appreciation (sec sch std)	Video production	Advanced composition
Art history		Composition
Ceramics	<b>Building Trades and Construction</b>	Journalism
Ceramics (Beginning and Advanced)	Cabinetmaking and wood products	
Cinematography/Artistic Videos (Begin or Adv)	Furniture making	<b>Fashion and Interior Design</b>
Crafts	Millwork and cabinetmaking	Apparel design and construction
Design	Woodworking	Apparel manufacturing, production and maint.
Digital Art/Computer Art/Artistic Graphics		Fashion and textile design
Drawing	<b>Computer Education</b>	Fashion merchandising
Fashion design	Web design	Fibers and textiles
Fibers and textiles		Interior design, furnishings, and maintenance
Fundamentals of Art (elem sch std)	<b>Consumer and Family Studies</b>	Other fashion and interior design
Fundamentals of Art (sec sch std)	Apparel design and construction	
Jewelry	Clothing and textiles	<b>Fine and Performing Arts</b>
Lettering/calligraphy	Fashion textiles and apparel	IB Art/design
Multicultural art/folk art	Housing and furnishings	IB Music
Multi-topic class		IB Theater arts
Other art course	<b>Dance</b>	
Painting	Advanced dance study (independent or studio)	<b>Information Technology</b>
Photography (beginning or advanced)	Ballet, modern, jazz, world dance	Computer graphics and media technology
Printmaking	Dance choreography and production	Web site development
Sculpture	Dance, movement & rhythmic fund. (elem sch std)	
	Dance, movement, & rhythmic fund. (sec sch std)	<b>Manufacturing and Product Development</b>
<b>Arts, Media, and Entertainment</b>	Folk/traditional dance	Architectural drafting
Animation	Multi-topic class	Exploring manufacturing and design, level 1
Arts management	Other dance course	Exploring manufacturing and design, level 2
Broadcast production		Jewelry design, fabrication and repair
Broadcasting technology	<b>Drama/Theater</b>	Principles of manufacturing and design tech
Choreography	Advanced Theater	Silk screen making and printing
Cinematography	Drama/creative dramatics	
Cinematography/Artistic videos (Begin or Adv)	History/appreciation of theater arts/film	<b>Marketing Sales and Services</b>
Commercial art	History/appreciation of drama/theater arts	Floristry
Commercial photography	History/appreciation of theatre/film/video/med	
Computer gaming and design	Media/film/video/television production	<b>Music</b>
Computer graphics and media technology	Multi-topic class	AP Music theory
Desktop publishing	Other drama/theater course	Band
Digital animation	Professional theater	Chorus/choir
Film-making	Technical theater	Chorus/choir/vocal ensemble
Graphic arts technology	Technical theater/stagecraft	Composition/songwriting
Graphic communications	Theatre /play production (sec sch std)	Computers and electronics/digital music
Integrated graphics technology	Theatre/creative dramatics (elem sch std)	Gen/classroom/exploratory music (elem sch std)
Internet publishing		Gen/exploratory/intro to music (sec school std)
Media/film/video television production	<b>Engineering and Design</b>	Instrumental ensemble
Multimedia production	Applied engineering and design communications	Instrumental music lessons (elem sch std)
Multi-topic class	Architectural and structural engineering	Instrumental music lessons (sec sch std)
Other arts, media, and entertainment	Blueprint reading	Multi-topic class
Photo production and technology	Civil/structural drafting	Music appreciation/history/literature
Photographic laboratory and darkroom	Computer-aided drafting/design	Music notation
Photography, lithography and plate making	Drafting occupations	Music theory
Professional theater/play production	Electrical/electronic drafting	Musical theater
Radio announcing apprenticeship	Engineering and design drafting	Orchestra/symphony
Radio presentation techniques	Engineering design	Other music course
Radio production	Exploring engineering and design, level 1	Professional music composition and arrangement
	Exploring engineering and design, level 2	Voice class

Source: California EDD, LMID, QCEW Series

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