Otis College of Art and Design

MAY 2016

2015 OTIS REPORT ON THE CREATIVE ECONOMY CALIFORNIA

Fast Facts

CREATIVE INDUSTRY OUTPUT

$374.5 Billion

(direct, indirect, induced)

TOTAL JOBS IN CALIFORNIA

1.6 Million

(direct, indirect, induced)

LARGEST NUMBER OF CREATIVE INDUSTRY WORKERS

California	722,600
New York	464,400
Texas	225,200

LARGEST DIRECT JOB COUNTS IN CALIFORNIA BY SECTOR:

Entertainment
Publishing and Printing
Fashion

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**

2015
OTIS
REPORT
ON THE
CREATIVE
ECONOMY
CALIFORNIA

2015 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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BRUCE W. FERGUSON
PRESIDENT
OTIS COLLEGE OF ART AND DESIGN

WHAT IS THE ECONOMIC IMPACT OF CREATIVITY?

In 2007, 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 Los Angeles and Orange Counties. The result—**the annual Otis Report on the Creative Economy of the Los Angeles Region**—has become a leading advocacy tool for the arts, design, and entertainment in the region; inspired a convergence of cross-sector leaders committed to working together to bolster the creative economy; and stimulated similar efforts and conversations in cities across the country, including one in our own backyard, Culver City, and even as far away as Kenya.

In 2013, with the generous support of the California Arts Council, the economic analysis included in the Otis Report was extended to the entire state of California. This initial effort was an important first step in documenting the size, role, and economic impact of the creative economy across California. The 2015 Otis Report on the Creative Economy of California is the third annual study, and again provides powerful and persuasive evidence of the enormous fiscal impact of the creative industries in California.

Here are a few highlights about California's creative economy from the 2015 Otis Report:

- Creative industry output totaled **$374.5 billion** (direct, indirect, and induced).
- The creative industry generated **1.6 million** jobs (direct, indirect, and induced), and those wage and salary workers earned **$123.5 billion** in total labor income.
- Property taxes, state and local personal income taxes, and sales taxes generated directly and indirectly by the creative industries were **$15.5 billion** across all of California.
- The largest **direct** job counts in California's creative sector were **entertainment** (166,300), **publishing and printing** (144,400), and **fashion** (120,800). Together, these three industries accounted for nearly 60% of direct creative industries employment in California.
- Creative occupations often require high levels of education or skills training. Of the 80 creative occupations identified for this report, **38** required a bachelor's degree or higher.

The Otis Report demonstrates that creativity and innovation thrive in Los Angeles, and the current renaissance happening throughout the city echoes this. New businesses, motion picture and television studios, restaurants, museums, start-ups, and tech hubs exhibit how the creative economy is intimately tied to the health and well-being of our citizens and communities. In an increasingly globalized world, where creative thinking and innovation are at the core of advancement, it is critical that leaders from the public, private, and nonprofit sectors work together to nurture and challenge the creative economy to continue to flourish and thrive.

REGIONAL SNAPSHOTS

New to this year's report are regional snapshots, each detailing the creative economies of eight regions in California. Inspired by the map used by the Governor's Office of Business and Economic Development (GO-Biz), the regions are defined as follows:

- Bay Area
- Capital Region
- Central Coast
- Inland Empire
- Central Valley
- San Diego-Imperial Valley
- Los Angeles-Orange County
- Upstate California

Each snapshot provides data on creative industry employment and trends, as well as job count comparisons between creative industries and non-creative industries, such as construction, financial activities, or state and local government. At the end of each snapshot are listings for the region's arts councils—local experts in that area's arts, cultural, and creative industry assets.

CREATIVE CALIFORNIA

Also new to this year's report is a comparison of the number of wage and salary workers in the creative industries in California and the rest of the nation. With 722,600 jobs, California far surpasses New York State which has 464,000 jobs, followed by Texas at 225,000 jobs. Furthermore, the report provides information on location quotients (LQ) which are used to quantify the concentration of a particular industry, industry cluster, occupation, or demographic group in a region compared to the nation. It reveals what makes a region unique and gives an indication of where a region has a competitive advantage. In California, seven of the ten occupations with the highest LQ are creative, meaning that the state has a higher concentration of those occupations than the nation as a whole. These include actors, artists' agents, fabric and apparel patternmakers, film and video editors, makeup artists, and media and communications workers.

THE STATE OF CREATIVITY

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

THE ACKNOWLEDGMENTS

The 2015 Otis Report on the Creative Economy of California 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 both the Los Angeles Regional Report and the California Report. Copies are available for download at http://www.otis.edu/otis-report-creative-economy.

I would also like to express my deep appreciation for the support of our lead sponsors, the California Arts Council and Mattel, whose commitment to the Otis Report has been vital and steadfast. Additionally, annual support from the City of Los Angeles' Department of Cultural Affairs, City National Bank, and our media partners, Arts for LA, Arts Orange County, Californians for the Arts, and the LAX Coastal Chamber of Commerce has enabled this conversation to evolve and grow, bringing stakeholders together to advance art and culture in their communities.

Bruce W. Ferguson
President
Otis College of Art and Design

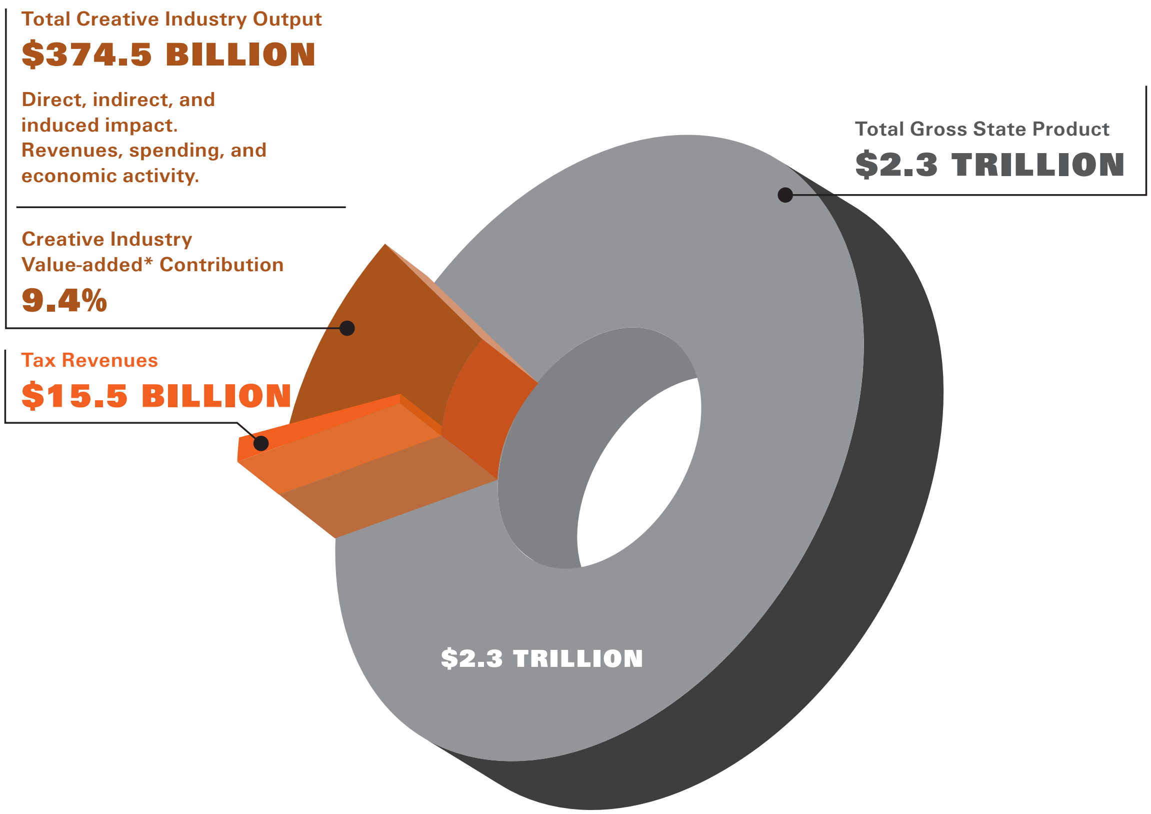
Otis prepares diverse students of art and design to enrich our world through their creativity, their skill, and their vision. The College offers an interdisciplinary education for approximately 1,200 full-time students, awarding BFA degrees in Architecture/Landscape/Interiors, Communication Arts, Digital 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.

*Watch the data in the Otis Report come to life in **The State of Creativity: A Look into the Otis Report on the Creative Economy**, which was developed in partnership with KCETLink in 2015. It can be viewed online at https://www.kcet.org/shows/artbound/artbound-special-episode-state-of-creativity.*

CA

ECONOMIC CONTRIBUTION

CALIFORNIA, 2014



*Labor income, corporate profits, and taxes on production.

CA

EMPLOYMENT

CALIFORNIA, 2014

Total Creative Industry Jobs (Direct, Indirect, Induced)

1.6 MILLION

Creative Industry Jobs Account for **11.9%** of All Workers in California

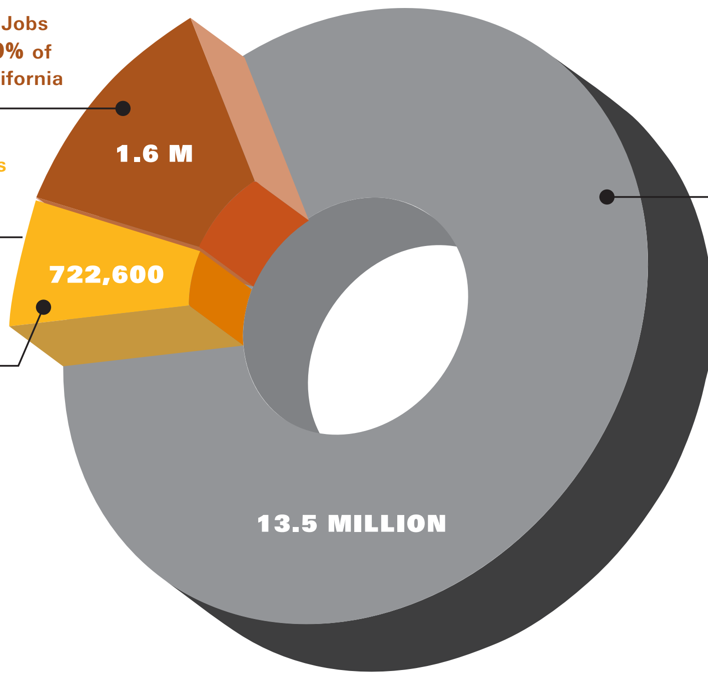
Direct Jobs in the Creative Industries

722,600

California has the largest number of creative workers of any state.

Total Wage and Salary Workers in California

13.5 MILLION



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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Los Angeles County Economic Development Corporation.

2015 OTIS REPORT ON THE CREATIVE ECONOMY OF CALIFORNIA

EXECUTIVE SUMMARY

CREATIVE INDUSTRY TRENDS

The creative industries of California turned in a solid performance in 2014 in terms of employment, labor income, and output. Over the five-year period covered by this report (2009 to 2014), direct wage and salary employment in California's creative industries increased by 43,100 jobs to 722,600 (up by 6.3%). This was a considerable improvement over the previous five-year cycle (2008 to 2013) during which employment contracted by 58,400 jobs (down by 7.8%).

With 722,600 wage and salary workers in the creative industries, California has the largest number of creative workers of any state. New York State is a distant second with 464,000 jobs, followed by Texas at 225,000 jobs. Florida and Illinois were next with 168,000 workers each.

However, creative employment as a share of total employment was highest in the state of New York at 6.2%, with California somewhat lower at 5.4%. Washington was third at 4.8%, Georgia was fourth at 4.6%, and North Carolina followed with 4.5%. For the U.S. as a whole, creative industry employment accounted for 3.6% of all wage and salary jobs.

Total direct labor income in the creative industries of California amounted to $76.1 billion in 2014 or 9.6% of annual private sector wage and salary payroll in California. Within the creative industries, the publishing and printing sector contributed the largest share with 32.1%, which equated to $24.4 billion (primarily internet publishing), followed by entertainment at $17.9 billion and digital media at $9.8 billion.

The state's creative economy is also driven by talented self-employed individuals. In 2013 (latest data available), there were 326,001 self-employed creative workers in California that earned $12.9 billion. Between 2008 and 2013, the number of self-employed workers in California increased by 13.5% (or 38,762 people), approximately matching the growth rate of wage and salary jobs over the same period. The growth of creative self-employed workers slightly outpaced the 11.0% state-wide increase of self-employed individuals across all industries.

While direct job counts in California's creative industries were impressive (722,600 in 2014), 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 those 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, jobs within the creative sector support or sustain other jobs in the state.

Direct, indirect and induced employment in the creative industries of California totaled nearly 1.6 million jobs in 2014, up from 1.4 million in 2013. The total labor income earned by these workers was $123.5 billion.

Overall, the creative industries of California generated $374.5 billion in economic output. Of that, $217.0 billion was value-added (corporate profits, labor income and taxes on production). This net economic contribution accounted for 9.4% of the state's gross product ($2.3 trillion) in 2014, up from the 8.1% share posted in 2013, an indication that the contribution of the creative industries to the state's economy is rising.

Activity in the creative sectors triggers not only jobs and spending, but it also results in tax revenues for state and local governments that help fund services such as education and public safety. Property taxes, state and local personal income taxes, and sales taxes generated directly and indirectly by the creative industries were $15.5 billion across all of California in 2014.

California continues to make steady economic progress, consistently experiencing overall job gains that have exceeded the nation as a whole. Over the period 2014 to 2019, California's wage and salary jobs are expected to grow by 9.6%. In comparison, the LAEDC projects that creative industries employment in California will grow at a slightly faster rate of 10.1% from 711,400 wage and salary jobs in 2014 to 783,000 in 2019[1]. All of the creative industries will experience wage and salary job gains. With liftoff in the housing market anticipated in 2016, 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 the national and state economies continue to expand, household expenditures on art, entertainment and toys should grow and lend support to the creative industries. Throughout this period, job gains will gradually close the gap between current creative economy employment and the pre-recession peak level of 767,000 jobs that prevailed in 2007.

New to the report this year is a detailed analysis that divides California into eight regions based on geography and economic linkages, and examines the creative economy of each. Although data at the sub-regional level is limited, the results reveal significant differences in the size and focus of the creative industries in each region. The purpose of the regional study is to highlight the diversity of California's creative economy. Included at the end of each section is information about arts agencies that may serve as local experts in that region's arts, cultural and creative-industry assets.

1
Employment at fine and performing arts schools are not included in the employment forecast.

TABLE 1:
2015 CREATIVE ECONOMY REPORT: NUMBERS AT A GLANCE

2014 Employment	
Direct Jobs	722,600
Direct creative industries workers as % of all private wage and salary workers	5.3%
Total jobs: direct, indirect and induced	1.6 million
Total creative industries workers as % of all private wage and salary workers	11.9%
2014 Labor Income	
Direct labor income	$76.1 billion
Total labor income: direct, indirect and induced	$123.5 billion
2014 Output	
Total creative industries output	$374.5 billion
Creative industires value-added*	$217.0 billion
Total state gross product	$2.3 trillion
Creative industries value-added as % of gross product	9.4%
2014 Taxes	
State and local taxes	$ 15.5 billion

* Labor income, corporate profits and taxes on production

2013 Self-Employed	
Number of self-employed	326,001
Receipts	$12.9 billion

IMPLICATIONS FOR THE CALIFORNIA ECONOMY

As demonstrated above, the creative industries of California contribute to economic growth and employment. They also foster innovation and spillover effects that enhance other industries. The creative industries help drive the state's economy by attracting investment, tourism and consumer spending and by generating tax revenues. In a post-industrial society, activities based on creativity and culture are an essential feature of a flourishing economy. Creativity and culture also have a non-monetary value in that they contribute to inclusive social development, dialogue and understanding between people.

Given the large economic contribution of the creative industries to California's economy, it is important to ask how stakeholders can nurture, support and grow the creative economy. Creativity is unique in that it relies on an unlimited resource: human ingenuity. Growth strategies in the creative economy should therefore focus on harnessing the development potential of this unlimited resource.

To strengthen the creative economy, a good place to start is at the beginning of the creative pipeline, Pre-K-12 education. Education in the visual, performing, literary and media arts are a necessary part of preparing students to meet the demands of the twenty-first century workforce, where workers now have to compete in a global labor market. Arts education fosters creative, critical thinking, problem solving and collaboration. In some ways, creativity has become as important in modern education as mastering specific language and computational skills.

California has one of the strongest policies on arts education in the nation, but uneven implementation and funding issues have resulted in huge disparities between schools in affluent areas compared with those in low-income areas. Closing these gaps would go a long way toward creating an even playing field for all of California's children and ensuring a future workforce with the skills necessary to gain entry into California's new economy.

Support for the creative industries might also include policies and initiatives that increase the competitiveness of California's creative firms and increase awareness of the state's creative and cultural products beyond its borders. Initiatives may come from state and/or local governments, but the creative industries themselves should play the dominant role in this process.

While it is beyond the scope of this report to recommend specific development strategies, potential strategies might include:

- A statewide branding initiative
- Marketing and partnerships that promote cultural tourism
- Capacity building through programs that teach business skills to entrepreneurs, professional education, consulting and coaching for business startups
- Building physical infrastructure (e.g. affordable housing/spaces for artists to work; improving mobility for people and freight)
- Creative business incubation
- Training programs that meet the specific needs of targeted industries
- Access to finance

The continuing vitality of California's creative firms will depend on expanding and deepening the state's pool of creative workers, on developing the ecosystem of California's creative firms through stronger networks of communication, the promotion of cross innovation and the emergence of new industries.

WHAT IS THE CREATIVE ECONOMY?

Creativity is one of California's foremost economic assets and the creative economy is undeniably important to the state'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 professionals and enterprises that take powerful, original ideas and transform them into practical and often beautiful goods, or inspire us with their artistry.

The creative economy also includes organizations that provide a venue for artists to share their work with the public such as museums, art galleries 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 other nonprofit 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 and out-of-the-box thinking as well as problem-solving and communication skills. The talent that drives the creative economy provides a competitive advantage that reaches across almost every industry in California. Creativity builds brand awareness and attracts talented people to a dynamic environment.

Regions acquire a competitive advantage when they attract creative employees. Creative thinkers encourage innovation, which in turn fosters economic growth. In recent years, many jobs have been outsourced in much the same way manufacturing jobs have been sent offshore, but original artistic creation, innovative design and other higher-level creative work cannot be outsourced as easily.

Arts and cultural amenities also attract tourism dollars, an important component of California's economy. Cultural amenities such as festivals, museums, historical monuments or regional culinary traditions are a major draw for tourists because these cultural assets help to build a region's unique identity.

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

NATIONAL AND GLOBAL ECONOMIC CONTEXT

The industries of California's creative economy respond to the ebbs and flows of the overall economy, not just California's but the U.S. as a whole. This section briefly summarizes recent and anticipated economic conditions and their likely effects on the state's creative industries.

The year 2015 was marked by steady growth in the U.S. economy, with gross domestic product (GDP) matching the previous year's growth rate of 2.4%. GDP growth has been modest, but it has also been steady and the source of solid job gains for several years running. As 2015 drew to a close, the U.S. was closing in on full employment with an unemployment rate of 5.0%. This was an important milestone for the economy, as it signaled a return to a more normal labor market.

At the same time, a pickup in wage gains drove growth in household incomes, and, in turn, consumer expenditures, which make up two-thirds of the domestic economy. Apart from the energy sector, most industries of the national economy grew, adding jobs and undertaking capital expenditures on technology, equipment, and buildings. International trade was the mixed bag of 2015. A stronger dollar enabled U.S. consumers and businesses to import more for less, but at the same time it made it more difficult for U.S. exporters to make sales given weakness among the nation's major trading partners.

GDP growth is expected to accelerate to 2.5% in 2016, with most industries adding jobs and continuing their capital expenditures. Wage gains are expected to spur consumer spending, while business spending will maintain momentum.

Meanwhile, the housing and construction sectors are expected to do well as a result of demographic changes: the oldest Millennials are now in their early thirties, the stage of life to form new households and exert greater demand for both rental and owner-occupied housing. Inflation, which was nearly nonexistent in 2015, is increasing somewhat but will stay below two percent over the foreseeable future. Finally, international trade will face challenges again in 2016 as the dollar appreciates further and trading partners see only marginal improvement in their economies, if any at all.

California has outpaced the nation in terms of both economic growth and job creation over the past year. Nearly all of California's industries added jobs in 2015 and will do so again in 2016. With improvements across much of the state, California's unemployment rate has converged on long-run normal levels. Personal income, which has improved during the last several years, will grow more quickly going forward.

What does all this mean for the creative industries of California? Several are related directly or indirectly to real estate and construction, such as: architecture and interior design, furniture and decorative arts, and product/industrial design. These industries should benefit from strength in real estate and construction during 2016. Other creative sectors may be more reliant on overall consumer spending or spending by individual consumer segments. These include art galleries, fashion, entertainment, toys, visual and performing arts, and digital media. Continued growth in consumer spending in the year ahead should provide a boost to these industries. Finally, both communications and printing and publishing may be facing structural changes, but they also tend to be pro-cyclical with the overall economy. As such, the outlook for continued growth implies that these sectors will see further expansion in the year ahead.

CREATIVE INDUSTRY TRENDS

EMPLOYMENT

A total of 722,600 wage and salary workers in California were employed directly in the creative industries in 2014. By sector, the largest employment counts were in entertainment (166,300 jobs); publishing and printing (144,400 jobs); and fashion (120,800 jobs). Together, these three industries accounted for nearly 60 percent of direct creative industries employment in California.

Direct employment in California's creative industries reached its peak in this cycle in 2007 at 767,000 jobs. Like total employment in the state, creative employment fell sharply during the recession. However, the state recovered all of its recession-era job losses by 2014 and has been in record territory since then. By contrast, the creative economy is still nearly 45,000 jobs shy of its pre-recession peak. The five-year comparisons (2009-2014) in this report capture the end of the recession, recovery and expansion with a gain of 6.3% or 43,100 jobs. By comparison, last year's report covered the previous five-year period (2008-2013), which included the entire recession and the early recovery years, and saw employment fall by 7.8% or 58,400 jobs.

Creative industries employment saw a larger decline relative to the overall state economy during the recession (15% versus 7.8%) and has been slower to recover. This can be explained in large part by the disproportionate share of manufacturing jobs in the creative economy. In 2014, manufacturing jobs were 8.1% of total nonfarm wage and salary employment in California but 24.3% of total creative economy employment. Between 2009 and 2014, total job counts in the state's manufacturing sector edged down by 1.1% but manufacturing employment in the creative industries declined by 8.5% over the same period. With manufacturing accounting for a larger share of creative economy employment compared to the state as a whole, and with creative manufacturing experiencing relatively larger job losses than other manufacturing sectors, the result has been a weaker turnaround in the creative industries overall when compared to total statewide employment.

It is encouraging to note that for employment in some manufacturing sectors, decline has either slowed or even reversed and expanded more recently. Job losses continued in textiles and apparel manufacturing, and printing and publishing, but cosmetics, jewelry, furniture, lighting fixtures and toy manufacturing showed employment gains over the year in 2014.

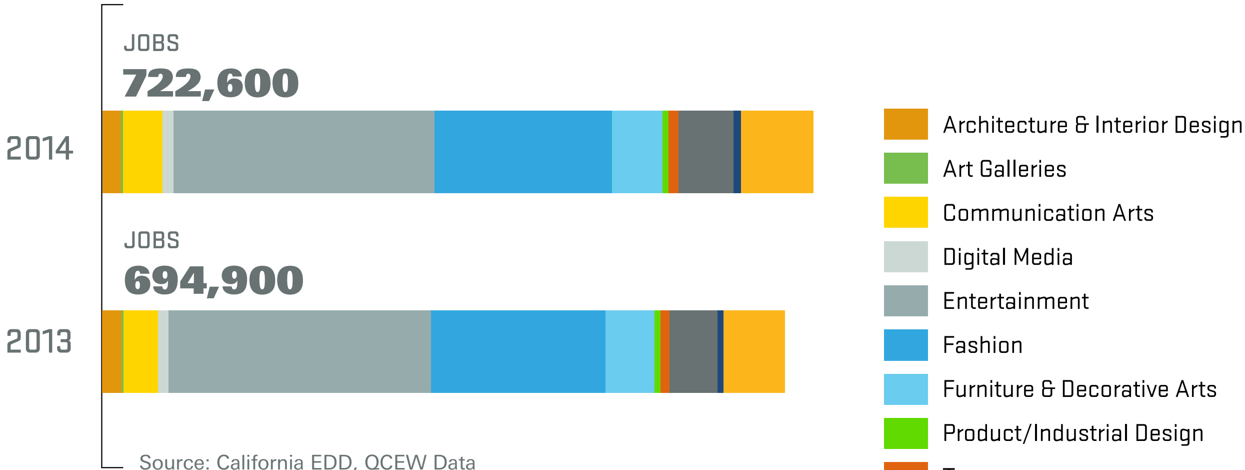
While some manufacturing jobs are returning as the economy nears full employment, it is unlikely manufacturing employment will regain pre-recession levels. Over the past three decades, manufacturing has shifted to more capital-intensive production, increasing output while using less labor. As a result, manufacturing employment has shown a trend decline, not just in California but across the U.S.

Conversely, the share of services employment has been on the rise: design, retail and wholesale. Service-sector jobs that require specialized skills and those that serve the local population are much harder to outsource. Many California firms choose to maintain domestic design facilities and/or research and development activities in the U.S. precisely because these are high value-added activities, less easily replicated elsewhere. Between 2009 and 2014, creative-industries employment in the service sector increased by 12.2%, with design and wholesale employment now accounting for over 75% of creative-industries employment.

Turning to more recent trends, creative industries employment in California increased by 4.0% or 27,700 jobs from 2013 to 2014. This was a full percentage point faster than the 3.0% rate recorded for total nonfarm employment in the state. Over the year, the publishing and printing industry posted the largest gain in both numerical and percentage terms, adding 13,200 jobs, an increase of 10.0%; two-thirds were in internet publishing and broadcasting. Architecture and interior design also posted a notable gain, expanding by over 3,400 jobs (9.2%), while furniture and decorative arts added 2,500 jobs (3.7%).

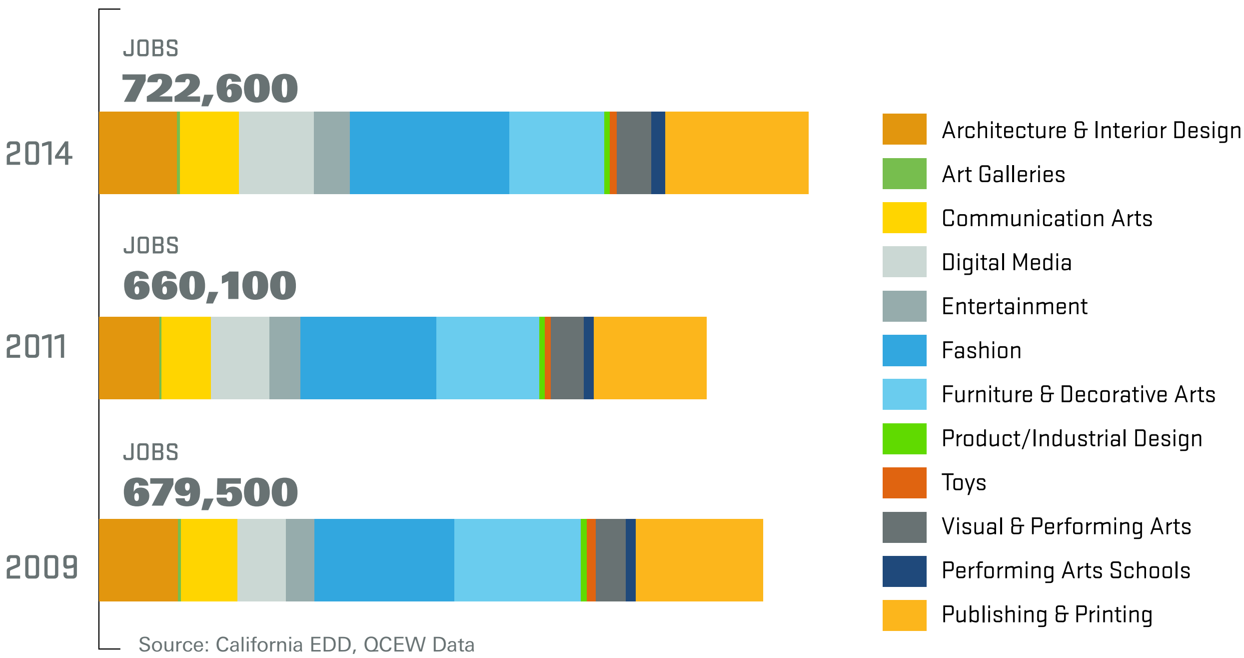
The largest component of the creative economy in California is the entertainment industry, which is concentrated in Los Angeles County. In 2014, there were 166,300 entertainment-related jobs in California, up slightly from 164,800 in 2009. Within this sector, motion picture and video production employment, which accounts for 67% of the jobs in the entertainment industry, increased by 6.0%. It may be that the expansion of the California Film Tax Credit is having its intended effect, although at this early stage, overall improvement in the state's economy was probably a bigger factor. See Table 48 in the Appendix for additional details.

JOB TRENDS IN THE CREATIVE INDUSTRIES 2013-2014



Source: California EDD, QCEW Data

JOB TRENDS IN THE CREATIVE INDUSTRIES 2009-2014



Source: California EDD, QCEW Data

CREATIVE CALIFORNIA: A COMPARISON

With 722,600 wage and salary workers in the creative industries, California has the largest number of creative workers of any state. New York State is a distant second with 464,400 jobs, followed by Texas at 225,200 jobs. Florida and Illinois were next with 168,300 workers each.

California is home to two of the top five creative economy centers. The Los Angeles region, consisting of Los Angeles and Orange counties, is far and away the largest with over 417,000 creative industry jobs. With nearly 96,000 creative economy jobs, the San Francisco metropolitan area follows New York and Chicago as the fourth largest center, but is just ahead of Seattle.

However, creative employment as a share of total employment was highest in the state of New York at 6.2%, with California at 5.4%. Washington was third at 4.8%, Georgia was fourth at 4.6%, and North Carolina followed with 4.5%. For the U.S. as a whole, creative industry employment accounted for 3.6% of all wage and salary jobs.

TABLE 2:
Top 5 Creative States in the U.S.

States	Creative Jobs	Total Wage & Salary Jobs	Creative Share of Total Wage & Salary Jobs
California	722,600	13,500,000	5.4%
New York	464,400	7,484,200	6.2%
Texas	225,200	9,597,300	2.4%
Florida	168,300	6,731,200	2.5%
Illinois	168,300	4,974,900	3.4%
Washington	121,400	2,519,500	4.8%
Georgia	156,400	3,396,700	4.6%
North Carolina	152,600	3,375,660	4.5%

TABLE 3:
Top 5 Creative Metro Areas in the U.S.

Metropolitan Statistical Area	Creative Jobs	Total Wage & Salary Jobs	Creative Share of Total Wage & Salary Jobs
Los Angeles-Long Beach-Anaheim	417,200	4,955,400	8.4%
New York-Newark-Jersey City	402,900	7,515,400	5.4%
Chicago-Naperville-Elgin	133,800	3,794,400	3.5%
San Francisco-Oakland-Hayward	95,700	1,874,100	5.1%
Seattle-Tacoma-Bellevue	91,900	1,531,000	6.0%

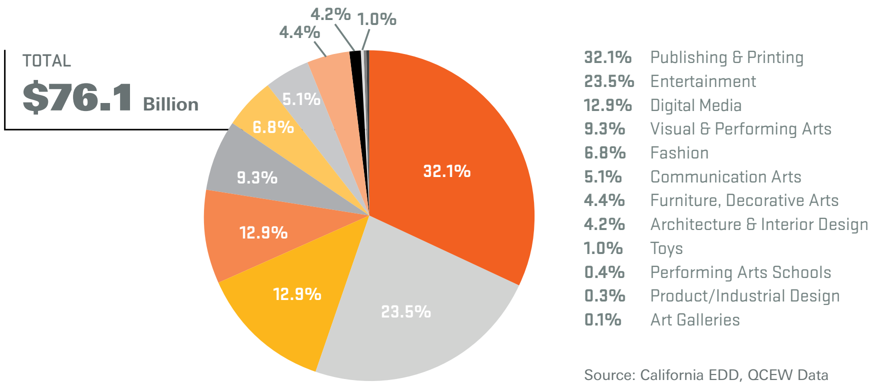
LABOR INCOME

Total direct labor income in the creative industries of California amounted to $76.1 billion in 2014. Examining the distribution of labor income across the creative economy provides a sense of how individual creative industries compare in size and economic value.

At $24.4 billion, the publishing and printing sector contributed the largest share (32.1%) to total creative-industry payrolls in California. Within this sector, over 80% of labor income was earned by workers in internet publishing and broadcasting. Entertainment was second with $17.9 billion (23.5%), followed by digital media at $9.8 billion (12.9%).

Every major creative-industry sector in California, even those that posted a decline in employment, recorded an increase in labor income from 2009 to 2014. This is encouraging because it implies that total income is increasing because of rising wages, and not simply because more people are working.

DIRECT LABOR INCOME OF THE CREATIVE INDUSTRIES IN 2014



Source: California EDD, QCEW Data

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

COUNTING THE SELF-EMPLOYED

A large and growing portion of the creative industries are driven by talented individuals who are self-employed. Although their contribution to the creative economy is significant, their activities are not captured in the federal and state employment data used to develop most of the job numbers in this report. 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 2013. **It is important to note that many of these individuals may work on the payroll of an employer and be self-employed as well.**

In 2013, there were 326,001 self-employed 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 up again in 2010. The number of self-employed has achieved new record highs every year since 2011. By contrast, payroll employment is years away from regaining and surpassing its pre-recession peak.

The number of self-employed grew by 13.5% (38,762 firms) between 2008 and 2013 in California, outpacing the 11.0% state-wide increase across all industries. In contrast, total wage and salary employment during this period fell by 0.4%.

Visual and performing arts providers continue to make up the largest segment of the self-employed by a wide margin (155,109), particularly the subset of independent artists, writers and performers. Many of these people are involved in the entertainment industry as actors, screen writers, set designers and other specialty occupations. As such, they often work temporary or short-term assignments for a number of separate productions over the course of a year as independent contractors. A large number (83,906) of self-employed also appear in the communication-arts sector as freelance graphic artists or as commercial or portrait photographers.

Receipts of creative self-employed in California were $12.9 billion in 2013, with 32.4% of that total generated by independent artists, writers and performers. Receipts in 2013 were up by 10.0% compared with 2008. In spite of the overall increase in the number of self-employed between 2008 and 2013, a handful of sectors saw declines in both the number of self-employed and in receipts. The number of self-employed individuals in publishing and printing edged lower by 0.8% while receipts fell by 3.1%, likely the result of continuing technological change and a restructuring of the industry. Although self-employment in architecture and interior design increased, total receipts fell. In the furniture and decorative arts industry, self-employment and receipts declined by 1.8% and 2.9% respectively. These two industries are closely tied to the housing market and although they may still be experiencing the lingering effects of the housing downturn, both should turn around in the coming years.

In certain creative sectors, self-employment is more common than wage and salary employment (Table 4). In the visual and performing arts there were nearly 2.8 self-employed persons in California for every salaried worker. The communication arts sector also has a high number of self-employed workers relative to salaried employees. In 2013, there were 1.9 self-employed persons for every salaried graphic designer, photographer or advertising professional in California. Again, there is likely to be significant overlap between salaried workers and the self-employed in creative industries.

Growth rates of creative self-employed also differ markedly by industry sector (Table 5). The fact that the growth of the self-employed overall continues to outpace that of wage and salary employment points to the increasing importance of self-employed individuals. This phenomenon is seen not only in the creative sectors but is occurring throughout the wider economy. One reason for this shift 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 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 continues to exert pressure on firms to cut costs. This has led companies to seek 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 not possible just a few years ago. This has allowed more creative people to strike out on their own as a matter of preference. The downside to this trend is the loss of many of the protections and benefits that come with being a wage and salary worker, prompting the question of whether a new category of worker needs to be defined.[2]

2
A Proposal for Modernizing Labor Laws for 21st Century Work: The "Independent Worker", Harris, Seth and Krueger, Alan; Brookings (December 2015)

TABLE 4:
RATIO OF SELF-EMPLOYED INDIVIDUALS TO SALARIED EMPLOYEES BY SECTOR, 2013

Industry Sector	Nonemployers	Employees	Ratio
Architecture & Interior Design	17,903	40,800	0.44
Art Galleries	2,378	2,200	1.08
Communication Arts	83,906	44,900	1.87
Digital Media	na	55,700	---
Entertainment	30,853	166,300	0.19
Fashion	14,326	120,800	0.12
Furniture & Decorative Arts	5,076	71,100	0.07
Product & Industrial Design	na	2,200	---
Publishing & Printing	15,285	144,400	0.11
Toys	1,165	7,300	0.16
Visual & Performing Arts	155,109	55,700	2.78

Note: Nonemployer data are not available for Digital Media and Product and Industrial Design
Source: California EDD QCEW data; Bureau of the Census Nonemployer Statistics

TABLE 5:
COMPARATIVE GROWTH RATES OF SALARIED EMPLOYEES TO SELF-EMPLOYED INDIVIDUALS, 2008-2013

Industry Sector	Nonemployer Growth 2008-2013	Employment Growth 2008-2013
Architecture & Interior Design	4.8%	-24.2%
Art Galleries	0.0%	-37.7%
Communication Arts	17.4%	-4.1%
Digital Media	na	23.6%
Entertainment	13.8%	-8.6%
Fashion	8.0%	-11.3%
Furniture & Decorative Arts	-1.8%	-23.7%
Product & Industrial Design	na	-29.6%
Publishing & Printing	-0.8%	-1.4%
Toys	6.2%	-24.6%
Visual & Performing Arts	15.5%	4.4%
Total Employment Growth:	**13.5%**	**-7.8%**

Note: Nonemployer data are not available for Digital Media and Product and Industrial Design
Source: California EDD QCEW data; Bureau of the Census Nonemployer Statistics

TABLE 6:
NONEMPLOYER FIRM STATISTICS FOR THE CREATIVE INDUSTRIES, 2008-2013

Creative Industry	NAICS Code	Number of Firms						Value of Receipts ($millions)					
		2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013
Architecture and Interior Design:		**17,085**	**16,628**	**17,093**	**17,476**	**17,406**	**17,903**	**$831.5**	**$675.1**	**$689.5**	**$719.9**	**$752.4**	**$801.7**
Architectural Services	54131	8,643	8,606	8,905	9,052	9,076	9,096	534.7	436.9	444.1	463.2	481.1	515.6
Drafting Serivices	54134	4,229	3,730	3,685	3,712	3,674	3,830	119.6	87.3	89.9	96.0	101.5	106.7
Landscape Design	54132	4,213	4,292	4,503	4,712	4,656	4,977	177.2	150.9	155.5	160.7	169.8	179.3
Art Galleries	45392	**2,377**	**2,311**	**2,265**	**2,295**	**2,373**	**2,378**	**$165.0**	**$122.7**	**$128.4**	**$146.7**	**$149.8**	**$155.3**
Communication Arts:		**71,466**	**72,249**	**75,676**	**78,754**	**81,391**	**83,906**	**$3099.8**	**$2714.3**	**$2958.7**	**$3127.3**	**$3324.8**	**$3434.4**
Specialized Design Services	5414	35,631	35,167	36,555	37,891	38,772	39,589	1464.4	1241.7	1345.4	1425.9	1508.1	1564.8
Advertising Agencies	5418	19,102	19,995	20,960	21,604	22,718	23,264	1132.0	1024.9	1130.6	1184.0	1262.1	1291.1
Photographic Services	54192	16,733	17,087	18,161	19,259	19,901	21,053	503.5	447.6	482.7	517.4	554.5	578.5
Entertainment:		**27,123**	**26,407**	**27,305**	**28,437**	**30,152**	**30,853**	**$1199.2**	**$1103.5**	**$1153.4**	**$1234.6**	**$1321.0**	**$1330.3**
Motion Picture/Video Production	5121	20,378	19,762	20,628	21,610	22,955	23,570	936.3	875.9	914.4	980.3	1052.2	1057.7
Sound Recording	5122	4,438	4,416	4,461	4,631	4,913	5,088	171.9	148.7	151.4	163.9	175.7	175.4
Broadcasting (except Internet)	515	2,307	2,229	2,216	2,196	2,284	2,195	91.0	79.0	87.5	90.5	93.1	97.2
Fashion:		**13,263**	**13,281**	**13,436**	**13,944**	**14,397**	**14,326**	**$1111.1**	**$1013.1**	**$1074.4**	**$1162.0**	**$1144.9**	**$1138.9**
Textile Mills Manufacturing	313	215	209	236	236	292	245	5.1	6.0	6.4	8.9	10.4	9.5
Apparel Manufacturing	315	4,476	4,448	4,428	4,554	4,713	4,717	211.6	200.5	212.7	212.4	211.3	218.4
Apparel Wholesaling	4243	4,665	4,665	4,722	4,908	5,021	4,962	488.0	448.4	478.1	522.6	511.7	511.7
Footwear Manufacturing	3162	117	118	107	108	140	131	6.3	6.3	5.9	5.6	6.7	6.1
Other Leather and Allied Products Mfg.	31699	351	347	339	346	384	390	15.8	14.0	14.9	16.2	14.7	15.9
Jewelry Wholesaling	42394	3,439	3,494	3,604	3,792	3,847	3,881	384.4	337.9	356.3	396.2	390.1	377.3
Furniture and Decorative Arts:		**5,170**	**5,046**	**5,034**	**4,975**	**5,084**	**5,076**	**$360.5**	**$310.8**	**$317.5**	**$333.5**	**$344.8**	**$350.1**
Textile Product Mills	314	368	355	343	335	413	392	15.1	18.2	17.6	15.9	16.0	15.6
Furniture Manufacturing	337	2,231	2,198	2,229	2,189	2,202	2,197	134.9	120.2	121.0	127.9	127.6	133.9
Furniture Wholesaling	4232	1,921	1,869	1,802	1,784	1,789	1,825	179.4	150.7	151.3	157.4	166.6	166.0
Glass & Glass Products Mfg.	32721	425	416	442	432	445	445	17.6	12.6	16.1	19.1	20.2	19.9
Other Misc. Nonmetallic Mineral Product Mfg.	3279	225	208	218	235	235	217	13.4	9.1	11.5	13.2	14.3	14.7
Toys:		**1,097**	**1,073**	**1,039**	**1,112**	**1,154**	**1,165**	**$79.1**	**$68.9**	**$73.6**	**$78.6**	**$77.8**	**$82.9**
Toy Wholesaling	42392	1,097	1,073	1,039	1,112	1,154	1,165	79.1	68.9	73.6	78.6	77.8	82.9
Visual and Performing Arts Providers:		**134,245**	**132,904**	**138,100**	**143,957**	**148,744**	**155,109**	**$4210.5**	**$3995.2**	**$4179.0**	**$4465.6**	**$4825.2**	**$4957.0**
Performing Arts Companies	7111	7,593	8,041	8,475	8,812	9,429	10,680	289.1	273.7	294.9	300.6	332.8	351.2
Agents & Managers of Artists, etc.	71141	6,920	6,942	7,387	7,793	8,028	7,856	364.4	337.9	351.9	385.6	402.6	397.1
Independent Artists, Writers, etc.	71151	119,003	117,255	121,627	126,715	130,550	135,891	3542.5	3369.6	3518.7	3765.6	4073.2	4192.3
Museums	7121	729	666	611	637	737	682	14.5	14.0	13.5	13.80	16.63	16.44
Publishing and Printing:		**15,413**	**15,147**	**15,158**	**15,382**	**15,682**	**15,285**	**$695.7**	**$631.3**	**$658.4**	**$666.8**	**$672.0**	**$674.3**
Printing & Related Support Activities	3231	4,509	4,555	4,507	4,498	4,521	4,326	261.7	236.7	256.7	263.5	263.8	250.9
Book, Periodical, Newspaper Wholesalers	42492	1,166	1,131	1,127	1,117	1,097	1,047	55.0	50.9	48.5	50.4	47.2	48.9
Publishign Industries (except Internet)	511	9,738	9,461	9,524	9,767	10,064	9,912	379.0	343.7	353.2	352.9	361.0	374.5
Total Nonemployer Firms:		**287,239**	**285,046**	**295,106**	**306,332**	**316,383**	**326,001**	**$11,752.3**	**$10,635.0**	**$11,232.8**	**$11,935.0**	**$12,612.6**	**$12,924.9**

Note: Nonemployer data are not available for all NAICS codes used in this report
Source: Bureau of the Census Nonemployer Statistics

ECONOMIC CONTRIBUTION OF THE CREATIVE INDUSTRIES

EMPLOYMENT AND WAGES

While direct job counts in California's creative industries are impressive, they are only 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. Additional induced jobs are generated when direct and indirect employees spend their wages on consumer goods and services. In that sense, every job within the creative sector supports other jobs in the state.

The ripple effect is substantial, giving rise to job gains and increases in income across a wide range of industries throughout the state's economy. In addition to the 722,600 direct jobs, the creative industries of California generated 860,800 indirect and induced jobs for a total of nearly 1.6 million jobs in 2014, up from 1.4 million in 2013. Moreover, labor income earned by these workers was $123.5 billion, up from $113.8 billion a year earlier.

The 326,001 self-employed in California's creative sector discussed above are not included in the count of direct employees in the creative economy as many may themselves be wage and salary employees. However, the total contribution does include the self-employed.

TAX EFFECTS

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

In California, property taxes, state and local personal income taxes, and sales taxes generated directly and indirectly by the creative industries were $15.5 billion in 2014. By sector, publishing and printing generated the highest tax revenues at $4.2 billion, followed by entertainment at $3.6 billion and fashion at $2.8 billion.

THE ECONOMIC CONTRIBUTION OF THE CREATIVE INDUSTRIES

In terms of their overall contribution to the state economy, the creative industries of California generated $374.5 billion in economic output in 2014, an increase of $80.7 billion (27.4%) over the previous year, the combined result of economic growth, employment growth, and increased labor productivity. Of the $374.5 billion in economic output, $217.0 billion was value-added (labor income, corporate profits and taxes on production). This net economic contribution accounted for 9.4% of the state's gross product of $2.3 trillion in 2014. This was an increase over 2013, when the creative industries value-added was $179 billion, accounting for 8.1% of the state's GDP of $2.2 trillion.

TABLE 7: ECONOMIC CONTRIBUTION OF THE CREATIVE INDUSTRIES, 2014

Employment	**1,583,400**
Direct	722,600
Indirect & Induced	860,800
Labor Income ($ billions)	**$123.5**
Direct	$76.1
Indirect & Induced	$47.4
Output ($ billions)	**$374.5**
Direct	$244.9
Indirect & Induced	$129.6
State/Local Taxes ($ billions)	**$15.5**

LOOKING AHEAD: THE CREATIVE ECONOMY IN 2019

California continues to make steady economic progress, consistently experiencing overall job gains that have exceeded the nation as a whole. In 2014, California recovered and surpassed the pre-recession job peak of 15.4 million jobs (2007). Most, but not all, industries have participated in these gains. Over the course of 2015, several industries repeatedly achieved all-time record high levels of employment.

Service-producing industries have largely improved and are gaining employment share relative to goods-producing industries. 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 and health care services, along with increases in professional and business-services employment, and the trade (wholesale/retail) industries.

Creative industries have participated in these gains with the service and manufacturing components of the creative economy reflecting the wider trends prevailing in the state. Digital media has thrived on the strength of information technology and related industries. Architecture and interior design, which is tied to real estate and the housing market, has seen a substantial increase in employment, while the furniture and decorative-arts sector 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 tied to the creative industries.

Will these trends continue? This section looks ahead to 2019, first with projections for the overall economy, followed by employment projections for the creative industries.

Over the period from 2014 through 2019, 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. In 2014, the state achieved record high employment levels, adding jobs across most sectors of the economy with significant increases continuing in health care, information technology, 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 711,400 jobs in 2014 to 783,000 wage and salary jobs in 2019, increasing by 10.1% or 71,600 jobs and ultimately surpassing the pre-recession peak level of 767,000 jobs from 2007 [3].

3
Employment at fine and performing arts schools are not included in the employment forecast.

All of the creative industries will experience wage and salary job gains. With the long-awaited liftoff in the housing market anticipated in 2016, there will be increased demand for architecture and interior design, as well as furniture and decorative arts. This will drive demand upstream to industrial design. As California's economy continues to expand, household expenditures on art, entertainment, and toys should grow, lending support to these creative industries.

Looking at individual segments, the largest numeric gain will be publishing and printing (including internet publishing), which is projected to add 21,400 jobs for an increase of 14.8%. The next largest increases are projected to occur in entertainment (12,500 jobs), digital media (7,600 jobs), communication arts (7,500 jobs), and furniture and decorative arts (7,300 jobs).

In percentage terms, communication arts will lead the way with a 16.9% increase, followed closely by product/industrial design (15.0%), publishing and printing (14.8%), and architectural and interior design (14.2%), with smaller but still significant gains occurring across the other creative industries.

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. As such, the historical and projected job counts cited here generally under-estimate total creative employment, both overall and within the individual industries.

TABLE 8:
CREATIVE INDUSTRIES EMPLOYMENT FORECAST, 2014-2019

Creative Industry	Number of Jobs (thousands)		2014-2019 Change		Compound Annual Growth Rate
	2014	2019f	Number	Percent	
Architecture & Interior Design	40.8	46.6	5.8	14.2%	2.7%
Art Galleries	2.2	2.4	0.2	9.3%	1.8%
Communication Arts	44.9	52.4	7.5	16.6%	3.1%
Digital Media	55.7	63.4	7.6	13.7%	2.6%
Entertainment	166.3	178.8	12.5	7.5%	1.5%
Fashion	120.8	125.3	4.5	3.7%	0.7%
Furniture & Decorative Arts	71.1	78.3	7.2	10.2%	2.0%
Product & Industrial Design	2.2	2.5	0.3	14.8%	2.8%
Publishing & Printing	144.4	165.7	21.4	14.8%	2.8%
Toys	7.3	7.5	0.1	1.6%	0.3%
Visual & Performing Arts Providers	55.7	60.1	4.4	8.0%	1.5%
Totals:	**711.4**	**783.0**	**71.6**	**10.1%**	**1.9%**

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

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 can also protect endangered habitats, reduce hospital stays, and conserve energy.

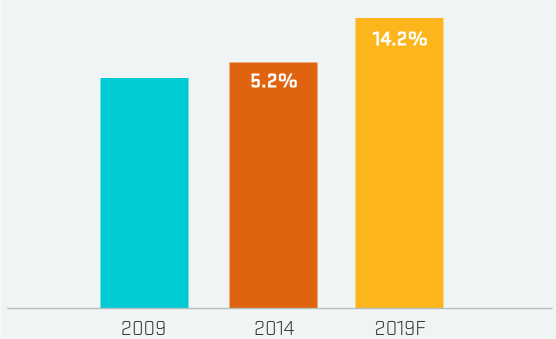
Employment in this sector is still recovering from the Great Recession, but job counts continue to trend up and further improvement is expected as the overall economy gains momentum, the Millennial generation starts forming its own households, and construction activity increases in the coming years.

TABLE 9: ECONOMIC CONTRIBUTION OF THE ARCHITECTURE AND INTERIOR DESIGN INDUSTRY, 2014

DIRECT EFFECTS	
Establishments	6,122
Jobs	48,800
Labor Income ($ billions)	$3.2
Nonemployer Establishments	17,903

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$11.6
Jobs	77,400
Total Labor Income ($ billions)	$5.1
Total Taxes ($ millions)	$439.5

EMPLOYMENT, 1000S AND PERCENT CHANGE



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)[4]. 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, it is a major draw for cultural tourists as well. There were 637 art galleries with 2,200 employees across California in 2014. The total economic impact was 3,000 jobs and output of $215 million. In addition, the self-employed found in the nonemployer data for California earned receipts of $155 million during 2013 (latest data available).

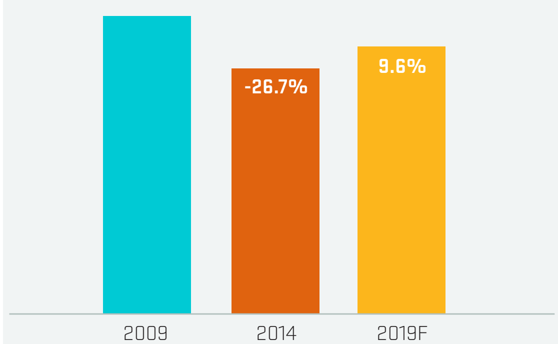
4
Carlyle, Erin, America's Most Creative Cities in 2014, (July 2014) www.forbes.com/sites/erincarlyle/2014/07/15/americas-most-creative-cities/

TABLE 10: ECONOMIC CONTRIBUTION OF ART GALLERIES, 2014

DIRECT EFFECTS	
Establishments	637
Jobs	2,200
Labor Income ($ millions)	$113.4
Nonemployer Establishments	2,378

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ millions)	$215.1
Total Jobs	3,000
Total Labor Income ($ millions)	$152.6
Total Taxes ($ millions)	$24.5

EMPLOYMENT, 1000S AND PERCENT CHANGE



COMMUNICATION ARTS

Individuals working in the communication arts combine art and technology to communicate ideas through images and other 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 use 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-art designers are the next largest sector. Graphic designers create "visual solutions" to communications problems using both digital and print media. They 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.

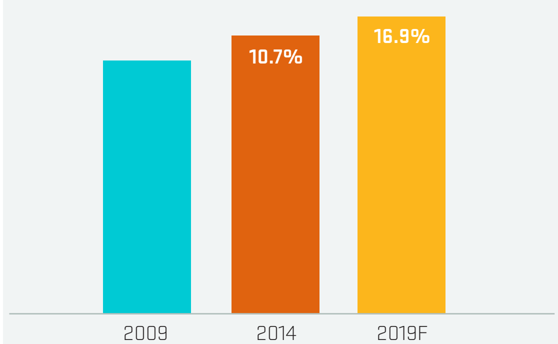
Employment in this sector fell modestly during the recession, bottoming out in 2010. As in other sectors, employment had not fully recovered by the end of 2014, but will continue to edge up in the coming years.

TABLE 11: ECONOMIC CONTRIBUTION OF THE COMMUNICATION ARTS INDUSTRY, 2014

DIRECT EFFECTS	
Establishments	5,996
Jobs	44,900
Labor Income ($ billions)	$3.9
Nonemployer Establishments	83,906

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$13.8
Total Jobs	80,000
Total Labor Income ($ billions)	$5.7
Total Taxes ($ millions)	$547.0

EMPLOYMENT, 1000S AND PERCENT CHANGE



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 can be found in related sectors such as motion-picture production, publishing and software design.

Digital technologies are an important part of the creative ecosystem because they give rise to new forms of creative expression. 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 and corporate); and interactive media (web, mobile). Individuals working in digital media may 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. The activity associated with these individuals would be captured in the industries in which they work.

Still, traditional data sources may not fully reflect total employment in the digital media industry as many software programmers are independent contractors who may not be captured in the payroll data. This report selects software publishers as the industry that best fits this activity. This captures a larger proportion of the Silicon-Valley digital media activity, but the employment and economic contribution of digital media activities is much larger than indicated across the state.

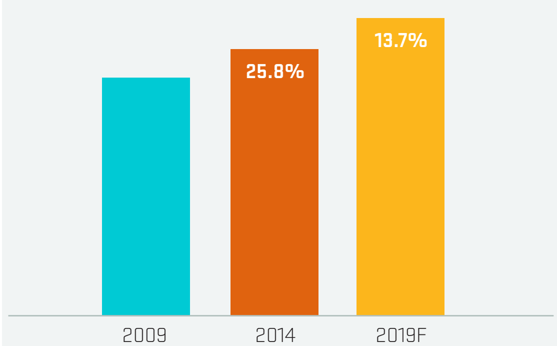
TABLE 12:
ECONOMIC CONTRIBUTION OF THE DIGITAL MEDIA INDUSTRY, 2014

DIRECT EFFECTS	
Establishments	1,356
Jobs	55,700
Labor Income ($ millions)	$9.8
Nonemployer Establishments	NA*

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$39.1
Total Jobs	129,800
Total Labor Income ($ billions)	$13.7
Total Taxes ($ billions)	$1.4

*Nonemployer data are not available for digital media

EMPLOYMENT, 1000S AND PERCENT CHANGE



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. Film-related activity can be found throughout the rest of the state as well.

The motion picture and sound recording sectors 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 entities 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 state because of the royalties earned overseas by films and TV shows produced in California.

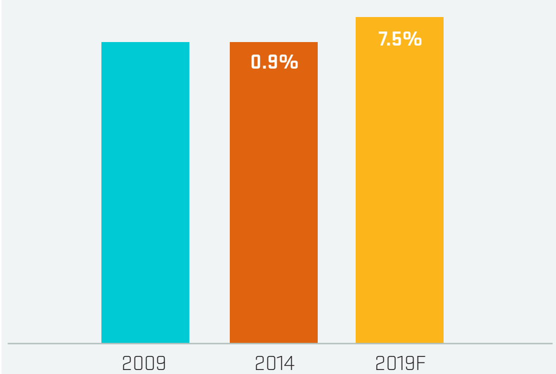
Several activities are included here: sound recording, motion picture and TV production, cable TV broadcasting, and radio stations. Musicians might be included here for recording film scores, but since many perform on the stage as well as in the studio, they may be included as employees or as nonemployer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

**TABLE 13:
ECONOMIC CONTRIBUTION OF THE ENTERTAINMENT INDUSTRY, 2014**

DIRECT EFFECTS	
Establishments	8,741
Jobs	166,300
Labor Income ($ billions)	$17.9
Nonemployer Establishments	30,853

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$104.4
Total Jobs	323,200
Total Labor Income ($ billions)	$26.5
Total Taxes ($ billions)	$3.6

EMPLOYMENT, 1000S AND PERCENT CHANGE



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 is still quite diverse. San Francisco is also home to a significant number of fashion designers and is earning recognition as a fashion center in its own right. In addition to apparel, the industry also includes textiles and jewelry manufacturing and design as well as footwear, handbag and cosmetics manufacturing, and wholesaling.

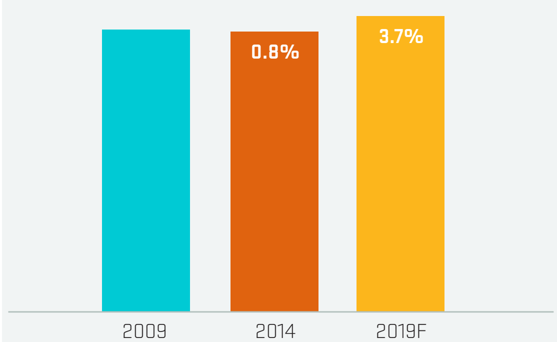
Although production of most apparel items has largely shifted to lower wage countries in Latin America and Asia, California is one of the few places in the U.S. where apparel continues to be manufactured on a large scale. Design-related activity is the principal means by which the apparel industry retains a strong presence in the state. Fashion goes hand-in-hand with the entertainment industry and the visual arts, and 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. This is especially important for the production of high-end items that require strict quality control and specialized skills or processing (like the high-end denim made in Los Angeles), as well as inexpensive "fast-fashion" production, where trends can come and go in the time it takes a container to make the voyage from Asia to Los Angeles.

TABLE 14: ECONOMIC CONTRIBUTION OF THE FASHION INDUSTRY, 2014

DIRECT EFFECTS	
Establishments	9,524
Jobs	120,800
Labor Income ($ billions)	$5.1
Nonemployer Establishments	14,326

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$40.6
Total Jobs	208,000
Total Labor Income ($ billions)	$10.2
Total Taxes ($ billions)	$2.8

EMPLOYMENT, 1000S AND PERCENT CHANGE



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.

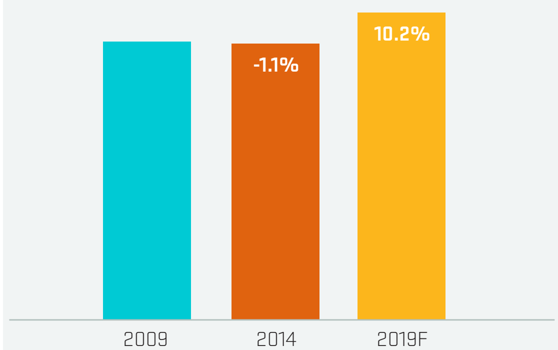
The furniture and decorative arts sector exemplifies the tension between localization and globalization. While the state's manufacturers face growing competition from inexpensive overseas labor, local designers continue to produce innovative and beautiful furnishings. California is also home to hundreds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

TABLE 15:
ECONOMIC CONTRIBUTION OF THE FURNITURE AND DECORATIVE ARTS INDUSTRY, 2014

DIRECT EFFECTS	
Establishments	4,508
Jobs	71,100
Labor Income ($ billions)	$3.4
Nonemployer Establishments	5,076

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$24.5
Total Jobs	124,000
Total Labor Income ($ billions)	$6.4
Total Taxes ($ billions)	$1.4

EMPLOYMENT, 1000S AND PERCENT CHANGE



PRODUCT/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, in that the design of a product is rooted in individual and collective aspirations.

The figures shown below reflect specialized design firms that serve as outside contractors or independent consultants to manufacturers and construction firms. However, many product and industrial designers are direct employees of companies that produce and sell a wide variety of consumer products. Thus, it is possible that the industrial design base in the state is larger than shown.

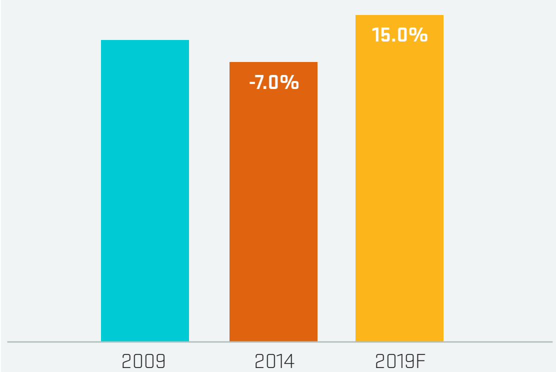
**TABLE 16:
ECONOMIC CONTRIBUTION OF THE PRODUCT/INDUSTRIAL DESIGN INDUSTRY, 2014**

DIRECT EFFECTS	
Establishments	343
Jobs	2,200
Labor Income ($ millions)	$197.4
Nonemployer Establishments	NA*

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ millions)	$394.1
Total Jobs	3,600
Total Labor Income ($ millions)	$266.8
Total Taxes ($ millions)	$24.0

*Nonemployer data are not available for digital media

EMPLOYMENT, 1000S AND PERCENT CHANGE



PUBLISHING AND 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.

The publishing and printing industry has the most employees in the Bay Area creative industries, accounting for approximately a quarter of the employment in that region captured in this report. In addition to print publishing, internet publishing links the industry to the technology firms located in the Bay Area.

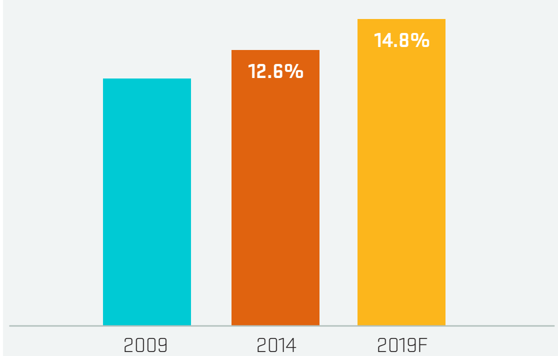
Although printing and publishing continue to be an important manufacturing industry in California, the sector has experienced large declines in the number of firms and workers employed in the industry over the last five years. Digital publishing displaces print media more and more each year. Growing 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.

TABLE 17:
ECONOMIC CONTRIBUTION OF THE PUBLISHING AND PRINTING INDUSTRY, 2014

DIRECT EFFECTS	
Establishments	7,188
Jobs	144,400
Labor Income ($ billions)	$24.4
Nonemployer Establishments	15,285

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$122.3
Total Jobs	499,600
Total Labor Income ($ billions)	$44.2
Total Taxes ($ billions)	$4.2

EMPLOYMENT, 1000S AND PERCENT CHANGE



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.[5] 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 state's entertainment industry through licensing agreements with the major film studios. Approximately 30% of all toys sold in the U.S. are licensed.[6] 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.

5
The Transformational Toy Industry, Little & King Company, LLC (2010)

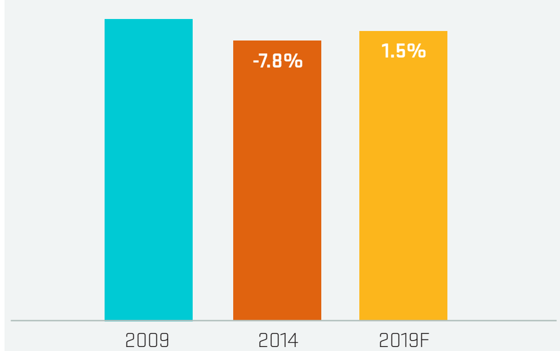
6
Observations on toys and Trends, Toy Industry Association, (August 2013)

**TABLE 18:
ECONOMIC CONTRIBUTION OF THE TOY INDUSTRY, 2014**

DIRECT EFFECTS	
Establishments	482
Jobs	7,300
Labor Income ($ millions)	$739.2
Nonemployer Establishments	1,165

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$2.9
Total Jobs	15,500
Total Labor Income ($ billions)	$1.2
Total Taxes ($ millions)	$280.7

EMPLOYMENT, 1000S AND PERCENT CHANGE



VISUAL AND PERFORMING ARTS

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

This category includes theater and dance companies, musical groups, other performing-arts companies, and museums, as well as independent artists, writers, entertainers, and their agents and managers. Many of these firms are nonprofit organizations.

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, contribute to lifelong learning in adults, and contribute to the education and development of children. Significantly, even people who do not attend performing arts exhibitions share this view.[7]

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.

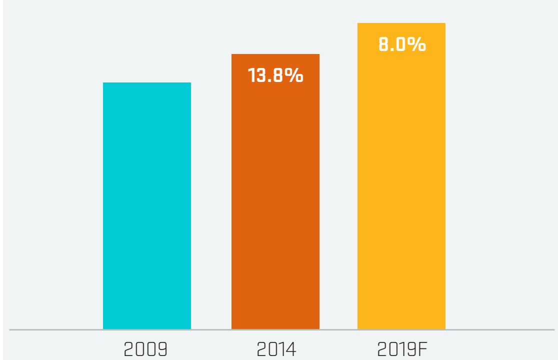
7 "The Value of Performing Arts in Five Communities 2," Urban Institutes (January 2004).

**TABLE 19:
ECONOMIC CONTRIBUTION OF THE VISUAL AND PERFORMING ARTS INDUSTRY, 2014**

DIRECT EFFECTS	
Establishments	12,356
Jobs	55,700
Labor Income ($ billions)	$7.1
Nonemployer Establishments	155,109

TOTAL (Direct, Indirect and Induced) EFFECTS	
Output ($ billions)	$13.8
Total Jobs	105,800
Total Labor Income ($ billions)	$9.7
Total Taxes ($ millions)	$807.1

EMPLOYMENT, 1000S AND PERCENT CHANGE



OCCUPATIONS IN THE CREATIVE ECONOMY

EMPLOYMENT

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

This section turns from industry analysis to an examination 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 both within the creative industries and in the rest of the economy. These data can also shed light on the extent to which creative industries employ people in functions outside of creative occupations. Occupational data only includes wage and salary employees. It does not cover the self-employed, or owners and partners in unincorporated firms.

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, 746 were included in the data set for the state of California, and of those, 80 have been identified as creative.

Creative occupations are 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 a marketing manager working in any number of industries, creative or otherwise, as might a graphic designer. This illustrates the fact that creative occupations may often be found outside the creative sectors of the economy.

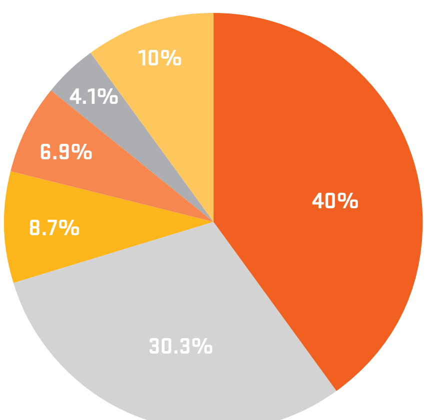
In 2014, there were 434,890[8] workers in California employed in a creative occupation. This represents 4.0% of total private occupation-based employment in the state. Similar to employment trends by industry, creative employment measured by occupation increased by 4.9% or 20,500 jobs between 2009 and 2014.

- There were 249,100 individuals employed in occupations related to art, design, entertainment or media, representing about 40% of the total.
- The next largest category by employment was computer and mathematical occupations with 189,110 workers, or 30% of the total. Many of these workers spend their days creating animated characters for film and TV, or designing video games. Given the current occupational classification system, it is still very difficult to isolate game-development employment. However, there were 9,560 individuals employed as multimedia artists and animators (SOC 27-1014), which may also capture some of that activity.
- The third largest category was education, training and library occupations with 54,290 workers or 9% of the total.

That numerous creative occupations 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.

8 This number excludes computer and mathematical occupations (software developers applications, 15-1132 and systems, 15-1133) because there was no comparable data for 2009 due to a change in how these occupations are coded. If these two occupation codes are included, total creative employment increases by 189,110 jobs to 624,000 in 2014.

DISTRIBUTION OF CREATIVE OCCUPATIONS BY MAJOR CATEGORY



40%	Art, Design, Entertainment and Media
30.3%	Computer or Mathematical
8.7%	Education Training and Library
6.9%	Management
4.1%	Architecture and Engineering
10%	Other

Source: Bureau of Labor Statistics; Occupational Employment Statistics

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 bear this out.

In 2014, the creative occupation earning the highest annual median wage (see end note) was marketing managers at $149,560. The lowest earning occupation was motion picture projectionists at $20,950, although this is an occupation that frequently employs part-time workers. The median wage across all occupations in California was $39,190 in 2014, up marginally from $38,920 in 2013. Out of the 80 creative occupations analyzed in this report, only 18 had a median annual wage less than the statewide median across all occupations. One reason for the relatively higher salaries found within the creative occupations is that many of these jobs require higher levels of education. Of the 80 creative occupations described in this report, nearly half require a bachelor's degree or higher.

The occupations in the chart below and in Table 20 were selected because they align closely with the creative industries. Between 2013 and 2014, there was a great deal of variation in the median annual wage, with six 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 2014 compared with the previous year, edging up by just 0.7%.

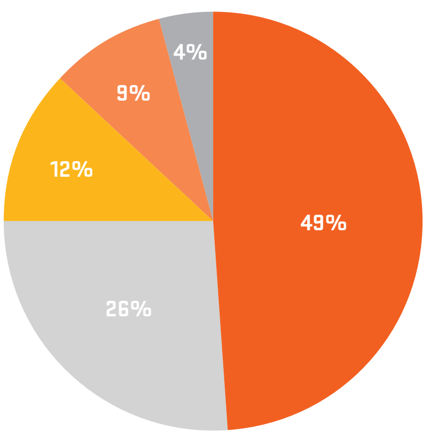
There are several reasons why many of the creative occupations below might have suffered a decline in wages. It may be that some of these occupations are concentrated in industries that are declining or are in the process of transforming through technological change (e.g. fabric and apparel pattern makers). Another possibility, one that reflects trends in the labor markets at large, is that more people in creative occupations may be working part time, which would cause a decline in the annual wage.

SELECTED ANNUAL MEDIAN WAGE FOR CREATIVE OCCUPATIONS, 2014

Software Developers	$115,590
Producers & Directors	$93,380
Architects	$85,030
Multimedia Artists & Animators	$79,790
Film & Video Editors	$79,250
Art, Drama & Music Teachers	$78,290
Writers & Authors	$73,370
Commerical & Industrial Designers	$67,600
Fashion Designers	$66,320
Sound Engineering Technicians	$57,890
Interior Designers	$55,010
Graphic Designers	$53,710
Fabric & Apparel Patternmakers	$47,220

Source: Bureau of Labor Statistics, Occupational Employment Stastistics

CREATIVE OCCUPATION ENTRY LEVEL EDUCATION REQUIREMENTS



Level of education needed to obtain entry level position, percentage of all creative occupations

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

TABLE 20:
EMPLOYMENT AND EARNINGS FOR SELECTED CREATIVE OCCUPATIONS, 2013 VS. 2014

California	Employment			Median Annual Wage		
Occupation	**2013**	**2014**	**#Change**	**2013**	**2014**	**%Change**
Architects	10,340	10,250	-90	$85,940	$85,030	-1.1%
Art, Drama & Music Teachers	11,380	13,830	2,450	$70,270	$78,290	11.4%
Commercial & Industrial Designers	3,660	3,950	290	$64,350	$67,600	5.1%
Fabric & Apparel Patternmakers	2,020	1,970	-50	$52,520	$47,220	-10.1%
Fashion Designers	5,720	5,570	-150	$64,770	$66,320	2.4%
Film & Video Editors	7,970	10,080	2,110	$78,660	$79,250	0.8%
Graphic Designers	26,290	27,180	890	$52,010	$53,710	3.3%
Interior Designers	6,200	5,860	-340	$57,790	$55,010	-4.8%
Multimedia Artists & Animators	10,300	9,560	-740	$81,290	$79,790	-1.8%
Producers & Directors	25,440	24,400	-1,040	$93,750	$93,380	-0.4%
Software Developers	95,510	106,660	11,150	$107,870	$115,590	7.2%
Sound Engineering Technicians	3,690	4,060	370	$67,470	$57,890	-14.2%
Writers & Authors	7,770	7,370	-400	$79,140	$73,370	-7.3%

End Note: Median versus Mean

Although median and mean (or average) 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 2014. 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 such as the it is weighted more towards the lower range or higher range, the mean can differ from the median by a wide margin and may not be representative of what most workers can expect to earn in an occupation. For example, agents and business managers of artists and performers in California have a mean annual wage of $126,330, but a median annual wage of $84,530 – a difference of $41,800. This implies there are individuals employed in this occupation earning an exceptionally high annual wage, skewing the average above the median.

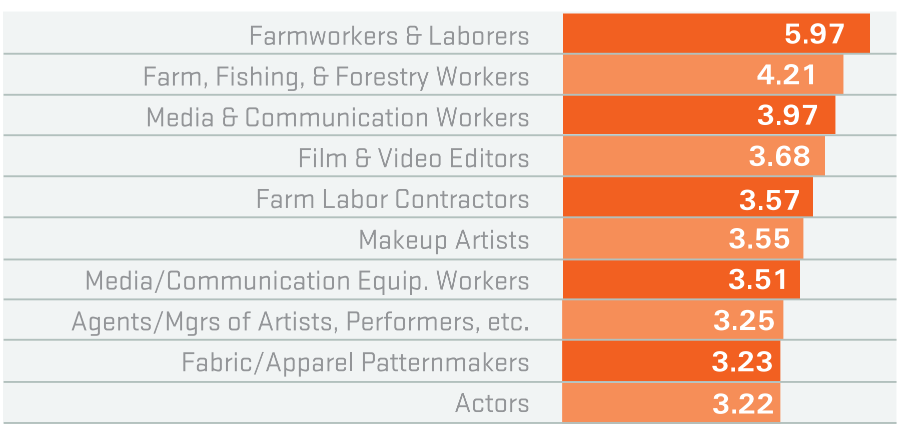
LOCATION QUOTIENTS IN THE LOS ANGELES REGION

A location quotient (LQ) can be used to quantify the concentration of a particular industry, industry cluster, occupation or demographic group in a region 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. Seven of the ten occupations with the highest LQ in California are creative, meaning that the state has a higher concentration of those occupations than the nation as a whole. These include media and communications workers, film and video editors, makeup artists, agents of artists, fabric and apparel patternmakers, and actors.

OCCUPATIONS WITH THE HIGHEST LOCATION QUOTIENTS IN CALIFORNIA



Source: Bureau of Labor Statistics, Occupational Employment Stastistics

NONPROFIT SEGMENT OF THE CREATIVE ECONOMY

The importance of arts and culture to economic development is well established. The activities of the many salaried and volunteer workers in non-profit organizations, and the charitable contributions made by individuals and corporations, support many creative activities throughout California.

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 smaller organizations per year that are selected to represent the entire universe of nonprofit organizations.

The SOI data are cumulative and are the most recent information the IRS has on file for exempt organizations. Therefore, this data does not cover a specific calendar year but instead provides a snapshot at the time it was accessed (here, September 2015). The SOI sample contained a total of 9,586 nonprofit organizations in California classified as arts, culture and humanities organizations. Nonprofit organizations of the creative economy are most highly concentrated in promoting culture and ethnic awareness (12.1% of the total); arts and cultural organizations (9.6%); theater (8.0%); and historical societies (6.6%).

Nonprofit arts education also has a significant presence in California. Based on the SOI sample, there were 84 nonprofit performing-arts schools and 399 nonprofit organizations dedicated to arts education in California.

The SOI data does not contain information pertaining to employment, but to the extent that nonprofits employed wage and salary workers, this employment is captured in the payroll data above.

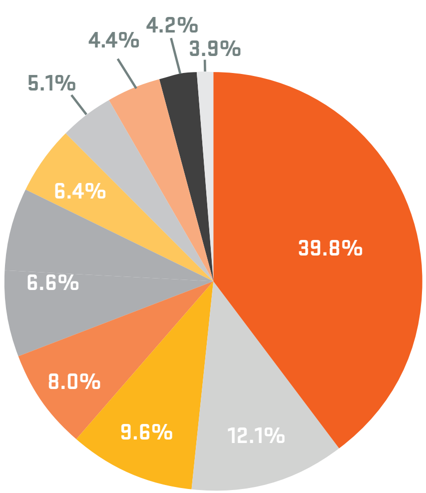
The total income reported by the sample of nonprofits in California amounted to $7.9 billion. Natural history and science museums earned 20.5% of nonprofit income in the state. Art museums earned a 16.9% share, followed by symphony orchestras (5.3%); history museums (4.9%); and theaters (4.6%).

Another way to measure the importance of nonprofits may be to look at the collective value of assets owned by nonprofit organizations in the region. As of September 2015, nonprofits in the California sample reported assets valued at $15.8 billion to the IRS. The largest share of assets was concentrated in art museums (21.9%); history museums (9.9%); other types of museums and museum activities (6.7%); and natural history museums (6.6%). 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.

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 and potential firms and employees 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 and contributing to society as a whole.

CONCENTRATION OF NONPROFIT ORGANIZATIONS IN THE CREATIVE ECONOMY BASED ON SOI SAMPLE STATISTICS[9]

NUMBER OF ORGANIZATIONS IN SAMPLE: 9,586



39.8%	All other organizations (3,813)
12.1%	Cultural, ethnic, awareness (1,156)
9.6%	Arts, cultural organizations (919)
8%	Theater
6.6%	Historical societies (635)
6.4%	Music
5.1%	Arts culture and humanities (491)
4.4%	Performing arts organizations (421)
4.2%	Arts education (399)
3.9%	Dance (374)

Source: IRS SOI Statistics

9 Note: All the figures related to nonprofits cited above and in Table 22 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 region.

TABLE 21:
COMPARISON NONPROFIT ORGANIZATIONS
FIGURES REPORTED 2014 OTIS REPORT VS. 2015

Based on Sample:	2014	2015	%Change
No. of Organizations	8,440	9,586	13.6%
Reported Income ($B)	$5.7	$7.9	38.6%
Reported Assets ($B)	$14.4	$15.8	9.7%

TABLE 22:
CALIFORNIA ARTS-RELATED NONPROFIT ORGANIZATIONS

NTEE Code	Description	Number of Organizations	Asset Amount ($1,000s)	Income Amount ($1,000s)	Form 990 Revenue Amount ($1,000s)
A01	Alliance/advocacy organizations	30	$2,051	$5,341	$52,859
A02	Management and technical assistance	11	$117,595	$58,861	$189,225
A03	Professional societies, associations	43	$24,830	$48,603	$434,887
A05	Research institutes and/or public policy analysis	12	$7,639	$4,976	$10,977
A11	Single organization support	164	$970,774	$353,337	$1,558,224
A12	Fund raising and/or fund distribution	142	$446,003	$30,071	$262,769
A19	Nonmonetary support N.E.C.*	24	$4,930	$6,951	$66,842
A20	Arts, cultural organizations - multipurpose	919	$587,098	$242,854	$2,035,359
A23	Cultural, ethnic awareness	1156	$602,986	$309,768	$1,344,697
A24	Folk arts	12	$1,296	$351	$540
A25	Arts education	399	$330,644	$321,506	$2,407,877
A26	Arts council/agency	92	$86,219	$48,884	$230,915
A27	Community celebrations	11	$2,963	$6,983	$69,521
A30	Media, communications organizations	111	$162,367	$125,621	$1,046,384
A31	Film, video	338	$164,076	$131,226	$1,261,335
A32	Television	86	$189,590	$151,693	$1,480,334
A33	Printing, publishing	158	$166,371	$48,966	$383,718
A34	Radio	80	$465,183	$201,654	$1,953,184
A40	Visual arts organizations	217	$45,835	$32,554	$219,001
A50	Museums, museum activities	284	$1,052,002	$294,936	$2,370,522
A51	Art museums	127	$3,449,752	$1,334,737	$4,603,066
A52	Children's museums	35	$110,352	$40,232	$341,179
A54	History museums	222	$1,567,182	$385,588	$2,132,627
A56	Natural history, natural science museums	36	$1,044,668	$1,615,026	$1,276,402
A57	Science and technology museums	28	$219,652	$95,957	$714,368
A60	Performing arts organizations	421	$36,967	$38,341	$365,515
A61	Performing arts centers	109	$739,325	$202,899	$1,695,123
A62	Dance	374	$38,537	$35,411	$335,984
A63	Ballet	89	$73,092	$86,874	$787,567
A65	Theater	767	$551,039	$362,397	$3,332,953
A68	Music	611	$186,862	$98,716	$839,080
A69	Symphony orchestras	166	$822,109	$414,596	$3,476,161
A6A	Opera	85	$385,367	$241,492	$1,870,114
A6B	Singing, choral	273	$27,139	$33,997	$317,466
A6C	Music groups, bands, ensembles	180	$27,733	$30,766	$288,905
A6E	Performing arts schools	84	$519,327	$175,105	$1,085,390
A70	Humanities organizations	266	$66,963	$57,695	$529,407
A80	Historical societies, related historical activities	635	$175,949	$49,294	$345,059
A82	Historical societies & historic preservation	134	$171,834	$53,113	$329,866
A84	Commemorative events	98	$35,537	$6,876	$48,150
A90	Arts service organizations and activities	66	$13,826	$14,299	$139,438
A99	Arts culture and humanities N.E.C.*	491	$87,552	$84,418	$537,449
		9,586	$15,781,215	$7,882,968	$42,770,440

*Not otherwise classified

Source: IRS SOI Statistics

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 workers now have to compete in a global labor market. Arts education fosters creativity, critical thinking, problem solving and collaboration. In some ways, creativity has become as important in modern education as mastering specific language and computational 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 of all stripes 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 arts education may be a component of a successful workforce development strategy.

Additionally, while no one questions the necessity of mastering language, math and science, a singular focus on these subjects ignores the needs of students whose talents run in a different direction. Marginalizing the arts risks marginalizing these students. 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 body of research that has shown arts education engages students in learning. When students are engaged, truancy and dropout rates decline. Student involvement in the arts is linked to higher academic performance, increased standardized test scores, and greater involvement in community service. 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. Thus, while arts education at the K-12 level may lead to cultural enrichment, it is also very important for both social and economic reasons.

California has one of the strongest policies on arts education in the nation, but uneven implementation and funding issues have resulted in huge disparities between schools in affluent areas compared with those in low-income areas. This situation creates opportunity gaps that, down the road, contribute to income and wealth inequality. In an era of tight budgets and a single-minded focus on standardized testing, arts education came to be viewed as a luxury. That mindset is changing, but change has been slow in coming.

The California Department of Education tracks student enrollment in course subject areas. This allows for the analysis of student participation in creative courses at the K-12 level. Beginning with the 2014 Creative Economy of California report, this section was expanded from a discussion previously limited to art, dance, music and theater classes to include media, entertainment, design and information technology. This set of creative subject areas aligns more closely with the industries and occupations that define the creative economy. What follows below, and in more detail in the appendix tables, is a description of the state's K-12 creative talent pipeline.[10]

According to the California Department of Finance, birth projections indicate a decline contributing to lower K-12 enrollment and reduced growth for future total enrollment. Over the next 10 years, K-12 enrollment in California is projected to decline by 0.4% (23,600 students). In the 2014-15 academic year, however, K-12 enrollment edged up by 0.2% over the previous year.

In comparison, K-12 student enrollment in creative subject areas during the 2014-15 academic year (AY) was up by 1.6% over the year. Both the total number of creative classes offered and those meeting UC/CSU entrance requirements increased as well, rising by 2.9% and 5.2% respectively, perhaps reflecting greater emphasis on preparing students for college. Over the five year period 2010-11 AY to 2014-15 AY, enrollment in creative courses expanded by 6.3%. Over that same period, the number of classes offered in creative subject areas increased by 25.2%, while the number of classes meeting UC/CSU requirements rose by 28.7%.

Every creative subject area saw an increase in enrollment over the last five years, but the fastest growing creative course subject areas have been information technology (web design); engineering and architecture; fashion and interior design; and arts, media and entertainment. The largest number of students in numerical terms were enrolled in visual art (34% of the total) and music (31%).

Looking at enrollment in creative subject areas by gender, the distribution between males and females has been consistent and fairly even over the last five years with females on average comprising 51% of creative course enrollment and males 49%. There is considerable variation by subject area, but given the current emphasis on STEM-related courses, it is concerning to note the ratio of males to females in computer, engineering and design classes over the last five years remains skewed heavily toward males. During the 2010-11 AY, the ratio was 27.8% female to 72.2% male. By 2014-15, in spite of efforts to encourage more encourage girls to sign up for computer and technology classes, the ratio of female to male computer, engineering and design students barely moved, rising only slightly to 28.4% versus 71.6%.

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 (Table 48, 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.*

10
The California Department of Education course subject area data changed following the 2012-13 academic year. Average class size and number of teachers were not included in the same data set for the 2013-14 and 2014-5 academic years as they were for prior years and therefore, are not reported here. There were also some changes to the major course subject areas. For list of subject areas and courses see Table 53 in the appendix.

CALIFORNIA REGIONAL SNAPSHOTS

CALIFORNIA REGIONAL SNAPSHOTS[11]

New to the report this year is a detailed analysis that divides California into eight regions based on geography and economic linkages, and examines the creative economy of each. Although data at the sub-regional level is limited, the results reveal significant differences in the size and focus of the creative industries in each region. The purpose of the regional study is to highlight the diversity of California's creative economy. Included at the end of each section is information about arts agencies that may serve as local experts in that region's arts, cultural and creative-industry assets.

11
Due to data BLS data suppression policies related to confidentiality and quality, the sum of regional employment figures may differ from the total employment figure reported for the state of California.

BAY AREA

With 8.4 million people, the Bay Area region is home to 22% of the state's population. It also hosts a similar share (21.4%) of the state's total creative industry employment, including an outsize presence in digital media (62% of the statewide total in that industry, not surprising for the region that includes Silicon Valley) and publishing and printing (42% of the statewide total). It is one of three regions in the state to have more than twice as many employees working for firms versus being self-employed in the creative industries.

The Bay Area includes the counties of :

Alameda
Contra Costa
Marin
Napa
San Benito
San Francisco
San Joaquin
San Mateo
Santa Clara
Santa Cruz
Solano
Sonoma

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The Bay Area had 167,740 wage and salary workers directly employed in creative industries in 2014, accounting for 4.3% of total wage and salary employment in the region. By sector, the largest employment counts were in publishing and printing (67,269 jobs accounting for 48% of statewide employment in the sector) and digital media (34,723 jobs accounting for 62% of statewide employment in the sector). However, six other sectors each contributed more than five thousand additional jobs (see Table 23), underscoring the Bay Area's creative diversity.

TABLE 23:
CREATIVE INDUSTRIES EMPLOYMENT, BAY AREA 2009 – 2014

Bay Area Creative Industries	Avg. Number of Jobs 2009	2014	2009-2014 Change Number	Percent
Architecture and Interior Design	11,705	12,738	1,033	8.8%
Art Galleries	511	430	-81	-15.9%
Communication Arts	9,483	11,330	1,847	19.5%
Digital Media	26,497	34,723	8,226	31.0%
Entertainment	7,458	9,701	2,243	30.1%
Fashion	6,410	7,471	1,061	16.6%
Furniture and Decorative Arts	9,599	10,932	1,333	13.9%
Product and Industrial Design	716	619	-97	-13.5%
Publishing and Printing	37,341	67,269	29,928	80.1%
Toys	924	504	-420	-45.5%
Visual and Performing Arts Providers	7,688	8,863	1,175	15.3%
Fine and Performing Arts Schools	2,634	3,160	526	20.0%
TOTAL	120,966	167,740	46,774	38.7%

EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

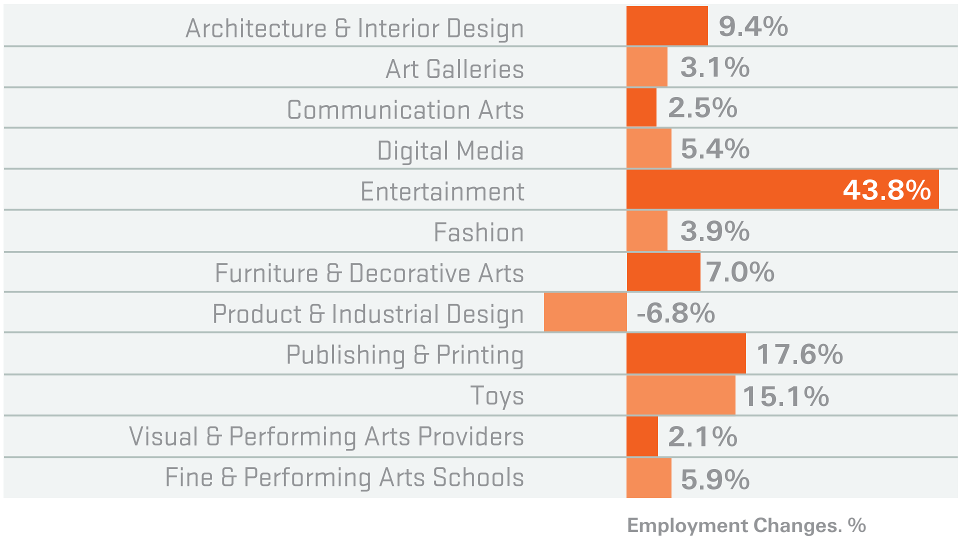
Five-Year Trends

Overall, Bay Area employment in the creative sectors has increased dramatically from five years ago (up 38.7%, see Table 23). The largest numerical gain was in publishing and printing, which has added nearly 30,000 jobs to the Bay Area's publishing sector since 2009, nearly doubling it in size. More moderate increases were widespread as the economy gained traction, with seven other sectors also posting double-digit growth rates. A few sectors did contract over this period, however. The toy sector, which was small to start with, lost nearly half its employment, while product and industrial design and art galleries had smaller declines.

One-Year Trends

Aside from product and industrial design employment, which continued to bounce around an overall downward trend, nearly all the Bay Area creative sectors experienced year-over-year employment growth in 2014. The entertainment sector expanded by 44%, by far its best performance in the comparison period (since 2009). Two other industries posted double-digit growth rates as well. Wage and salary employment in the toy industry grew for the first time since 2009, and employment in publishing and printing continued to show a strong upward trend.

CREATIVE INDUSTRIES EMPLOYMENT GROWTH, BAY AREA, 2013 – 2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

In line with the recent uptick in employment, the total number of creative-industry establishments has also risen in the Bay Area (see Table 24). The gains were widespread, with only two sectors, art galleries and fashion, losing a handful of firms. Two sectors experienced double-digit growth in firms over the year in 2014: digital media added 73 establishments for a growth rate of 13%, and fine and performing art schools added 44 firms for a growth rate of 12%. However, it was the much larger architecture and interior design sector that added the largest number of new creative-industry firms to the region – 122 new establishments accounting for 29% of the Bay Area's total firm growth in the creative industries.

Total direct labor income in the Bay Area's creative industries amounted to $31.7 billion in 2014 (see Table 24), up from $12.6 billion in 2009. The Bay Area's thriving publishing and printing sector contributed the largest share (62%) to total creative sector payrolls, followed at a distance by digital media (22%). Entertainment was the third largest contributor (4%), although it had the highest year-over-year growth rate (47%) matching its impressive employment growth rate.

TABLE 24: ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, BAY AREA, 2013 – 2014

Bay Area Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	1,778	7.4%	1,088.9	3.4%
Art Galleries	160	-3.6%	24.4	0.1%
Communication Arts	1,382	3.1%	1,176.7	3.7%
Digital Media	633	13.0%	7,016.0	22.1%
Entertainment	678	5.8%	1,282.7	4.0%
Fashion	895	-0.6%	349.4	1.1%
Furniture and Decorative Arts	923	1.9%	584.2	1.8%
Product and Industrial Design	82	6.5%	68.6	0.2%
Publishing and Printing	1,845	3.0%	19,539.9	61.7%
Toys	77	2.7%	42.6	0.1%
Visual and Performing Arts Providers	962	4.8%	444.2	1.4%
Fine and Performing Arts Schools	425	11.5%	70.4	0.2%
TOTAL	**9,840**	**4.5%**	**31,688.0**	**100.0%**

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 70,280 self-employed creative workers in the Bay Area region. Approximately 77% were in either the visual and performing arts sector or communication arts. Many of these workers may also be included in the wage-and-salary employment count and thus are not additive.

TABLE 25: NONEMPLOYER FIRMS, BAY AREA, 2013

Bay Area Creative Industries	Self-Employed 2013
Architecture and Interior Design	4,552
Art Galleries	589
Communication Arts	21,379
Digital Media	---
Entertainment	4,072
Fashion	2,131
Furniture and Decorative Arts	930
Product and Industrial Design	---
Publishing and Printing	3,987
Toys	184
Visual and Performing Arts Providers	32,456
Fine and Performing Arts Schools	---
TOTAL	**70,280**

THE CREATIVE INDUSTRIES IN CONTEXT

- With 270,280 direct jobs in 2014, employment in Bay Area creative sectors accounted for 23.1% of creative-industry employment in the state.
- This wage and salary employment accounted for 4.0% of total nonfarm wage and salary employment in the Bay Area region. Compared to strictly non-creative employment in the largest (by a slight margin) metropolitan area in the region (the Oakland-Hayward-Berkeley metropolitan division), this was:

    - more employees than in either **Health Care** and **Social Assistance** (148,800) or **State and Local Government** (149,500),
    - roughly twice the size of **Food Services and Drinking Places** (75,100),
    - roughly three times the size of **Construction** (56,400) or **Financial Activities** (49,700).

Regional Councils and Commissions:

- Alameda County Arts Commission www.acgov.org/arts/html/home.html
- Arts and Culture Commission of Contra Costa County www.ac5.org
- Marin Arts Council www.marinarts.org
- Arts Council Napa Valley www.artscouncilnapavalley.org
- San Benito County Arts Council www.sanbenitoarts.org
- San Francisco Arts Commission www.sfartscommission.org
- San Mateo County Arts Commission www.cmo.smcgov.org/arts-commission
- SV Creates www.svcreates.org
- Arts Council Santa Cruz County www.artscouncilsc.org
- Solano County Arts Council www.solanocountyartscouncil.com
- Creative Sonoma www.sonomacounty.com/cultural-arts/creative-sonoma

CAPITAL REGION

With 2.3 million people, the Capital region is home to 6% of the state's population. A center of government, the region hosts only 2.2% of the state's total creative industry employment, including an outsize presence in architecture and interior design (5% of statewide total employment in the industry), as well as art galleries and communication arts (4% of the statewide total each). The region has about a third more employees that are self-employed versus working for firms in the creative industries.

The Bay Area includes the counties of :

Alameda
Contra Costa
Marin
Napa
San Benito
San Francisco
San Joaquin
San Mateo
Santa Clara
Santa Cruz
Solano
Sonoma

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The Capital region had 10,209 wage and salary workers directly employed in creative industries in 2014, accounting for 1.1% of total wage and salary employment in the region. By sector, the largest employment counts were in publishing and printing (3,219 jobs accounting for 2% of statewide employment in the sector) and architecture and interior design (1,740 jobs accounting for 4% of statewide employment in the sector). Three other sectors each contributed more than a thousand additional jobs (see Table 26), helping to anchor the region's creative presence.

TABLE 26:
CREATIVE INDUSTRIES EMPLOYMENT, CAPITAL REGION, 2009 – 2014

Capital Region Creative Industries	Avg. Number of Jobs		2009-2014 Change	
	2009	2014	Number	Percent
Architecture and Interior Design	1,966	1,740	-226	-11.5%
Art Galleries	131	46	-85	-64.9%
Communication Arts	1,139	1,060	-79	-6.9%
Digital Media	354	384	30	8.5%
Entertainment	466	1,134	668	143.3%
Fashion	209	222	13	6.2%
Furniture and Decorative Arts	1,987	1,411	-576	-29.0%
Product and Industrial Design	30	0	-30	-100.0%
Publishing and Printing	3,636	3,219	-417	-11.5%
Toys	74	132	58	78.4%
Visual and Performing Arts Providers	578	613	35	6.1%
Fine and Performing Arts Schools	227	248	21	9.3%
TOTAL	10,797	10,209	-588	-5.4%

EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

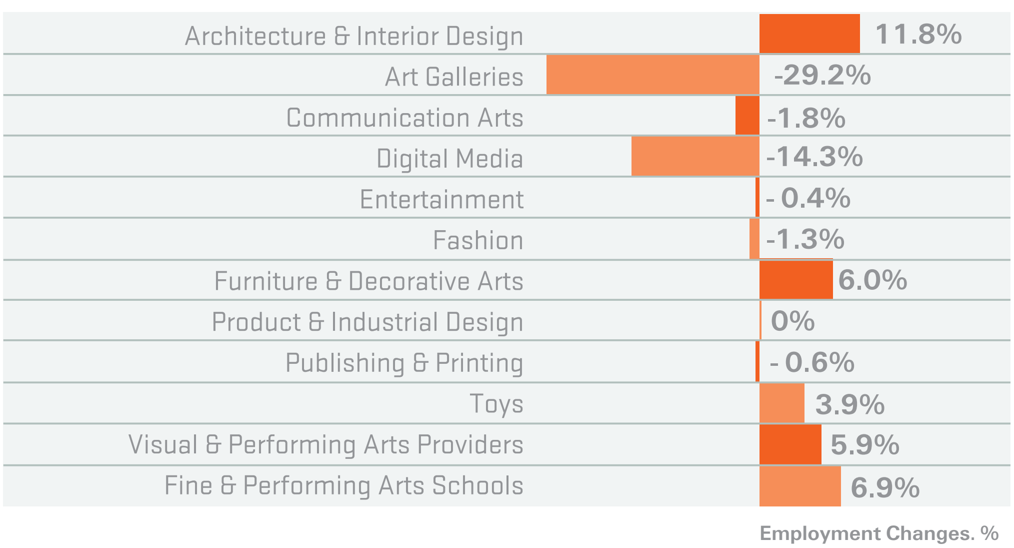
Five-Year Trends

Overall, the Capital region employment in the creative sectors has declined relative to five years ago (down by 5.4%, see Table 26). The largest numerical decline was in furniture and decorative arts, which has lost over 500 jobs since 2009 due in part to competition from low-wage workers overseas. Publishing and printing was a close second, losing just over 400 jobs. The product and industrial design sector was the hardest hit in percentage terms, declining by 100% to zero wage and salary employment, and although this industry left, it was very small to begin with. Declines were evenly matched, however, as about half the creative sectors expanded over this period. Entertainment employment more than doubled in size, taking the industry from less than 5% of creative-industry employment in the region to over 11%.

One-Year Trends

More recently, employment in the creative industries continues to struggle in the Capital region, with just over half the sectors posting year-over-year declines in 2014. Only one creative sector, architecture and interior design, posted a double-digit employment growth rate, while two others, art galleries and digital media, saw double digit rates of decline. However, art galleries have a very small presence in the region (less than one percent of creative-industry employment). Overall, the expanding sectors added almost 2.5 jobs for every job lost in declining sectors (318 gained versus 130 lost).

CREATIVE INDUSTRIES EMPLOYMENT GROWTH, CAPITAL REGION, 2013 – 2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

On net, the total number of creative-industry establishments in the Capital region rose in 2014 (see Table 27), and most sectors posted positive establishment growth rates. Product and industrial design led the way, adding a single establishment to this relatively small industry for a growth rate of 11%, followed by visual and performing arts providers, which added 11 firms for 9.6% growth.[12] Architecture and interior design came in third at 9.3% growth, but its 21 new firms—the largest numerical addition—accounted for half the Capital region's creative-industry firm growth, on net. On the other side, art galleries, digital media, and furniture and decorative arts each lost a handful of firms (seven in total).

12
In instances where employment is reported as zero, but there are firms, the BLS has suppressed the employment data for reasons of confidentiality or quality.

Total direct labor income in the creative industries of the Capital region amounted to $0.54 billion in 2014 (see Table 27), up from $0.50 billion in 2009. At $163 million, the publishing and printing sector contributed the largest share (30%) to total creative sector payrolls, followed by the architecture and interior design sector (12% and $123 million). Three additional sectors contributed more than $50 million each: entertainment (12.6% and $69 million), communication arts (10.5% and $57 million) and furniture and decorative arts (10% and $55 million).

TABLE 27: ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, CAPITAL REGION, 2013 – 2014

Capitol Region Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	246	9.3%	122.5	22.5%
Art Galleries	25	-7.4%	2.0	0.4%
Communication Arts	221	1.4%	57.0	10.5%
Digital Media	37	-7.5%	40.2	7.4%
Entertainment	104	1.0%	68.6	12.6%
Fashion	94	-2.1%	9.4	1.7%
Furniture and Decorative Arts	177	3.5%	54.5	10.0%
Product and Industrial Design	10	11.1%	0.0	0.0%
Publishing and Printing	288	0.3%	162.9	30.0%
Toys	12	9.1%	6.3	1.2%
Visual and Performing Arts Providers	125	9.6%	16.5	3.0%
Fine and Performing Arts Schools	58	7.4%	3.5	0.6%
TOTAL	1,397	3.1%	543.4	100.0%

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 13,005 self-employed creative workers in the Capital region. Approximately 74% were either visual and performing arts providers or worked in communication arts. Many of these workers may also be included in the wage-and-salary employment count and thus are not additive.

TABLE 28:
NONEMPLOYER FIRMS, CAPITAL REGION, 2013

Capital Region Creative Industries	Self-Employed 2013
Architecture and Interior Design	948
Art Galleries	100
Communication Arts	4,048
Digital Media	---
Entertainment	668
Fashion	476
Furniture and Decorative Arts	219
Product and Industrial Design	---
Publishing and Printing	895
Toys	51
Visual and Performing Arts Providers	5,600
Fine and Performing Arts Schools	---
TOTAL	13,005

THE CREATIVE INDUSTRIES IN CONTEXT

- With 10,209 direct jobs, employment in the Capital region creative sector in 2014 accounted for 1.4% of total creative-industry employment in the state.
- This wage and salary employment accounted for 1.1% of total nonfarm wage and salary employment in the Capital region. Compared with strictly non-creative employment in the major metropolitan area in the region (the Sacramento-Roseville-Arden Arcade metropolitan statistical area) this was:
    - more employees than in either **Real Estate** (10,000) or the **Total Farm** sector (8,900),
    - roughly half the size of **Transportation, Warehousing and Utilities** (22,900),
    - roughly a quarter the size of **Ambulatory Health Care Services** (41,500) and **Construction** (43,300),
    - roughly a fifth the size of **Financial Activities** (49,400).

Regional Councils and Commissions:
- El Dorado Arts Council www.eldoradoartscouncil.org
- Nevada County Arts www.nevadacountyarts.org
- Arts Council of Placer County (Placer Arts) www.placerarts.org
- Sacramento Metropolitan Arts Commission www.sacmetroarts.org
- Yolo County Arts Council (Yolo Arts) www.yoloarts.org

CENTRAL COAST

The Central Coast includes the counties of :

Monterey
San Luis Obispo
Santa Barbara
Ventura

With 2.0 million people, the Central Coast region is home to 5% of the state's population, but only 2.7% of the state's total creative industry employment. This includes an outsize presence in art galleries (7% of the statewide total employment in the industry, not surprising given the region's artistic reputation) and product and industrial design (also 7% of the statewide total). The region has a similar number of employees working for firms as self-employed in the creative industries.

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The Central Coast region had 14,974 wage and salary workers directly employed in creative industries in 2014, accounting for 2% of total wage and salary employment in the region. By sector, the largest employment counts were in publishing and printing (3,420 jobs accounting for 2% of statewide employment in the sector), digital media (2,386 jobs accounting for 4% of statewide employment in the sector) and furniture and decorative arts (2,346 jobs accounting for 3% of statewide employment in the sector).

TABLE 29:
CREATIVE INDUSTRIES EMPLOYMENT, CENTRAL COAST, 2009 – 2014

	Avg. Number of Jobs		2009-2014 Change	
Central Coast Creative Industries	2009	2014	Number	Percent
Architecture and Interior Design	1,433	1,390	-43	-3.0%
Art Galleries	312	163	-149	-47.8%
Communication Arts	903	952	49	5.4%
Digital Media	1,373	2,386	1,013	73.8%
Entertainment	1,054	1,135	81	7.7%
Fashion	1,366	1,254	-112	-8.2%
Furniture and Decorative Arts	1,808	2,346	538	29.8%
Product and Industrial Design	119	156	37	31.1%
Publishing and Printing	4,209	3,420	-789	-18.7%
Toys	136	128	-8	-5.9%
Visual and Performing Arts Providers	1,287	1,318	31	2.4%
Fine and Performing Arts Schools	488	326	-162	-33.2%
TOTAL	14,488	14,974	486	3.4%

EMPLOYMENT IN EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

Five-Year Trends

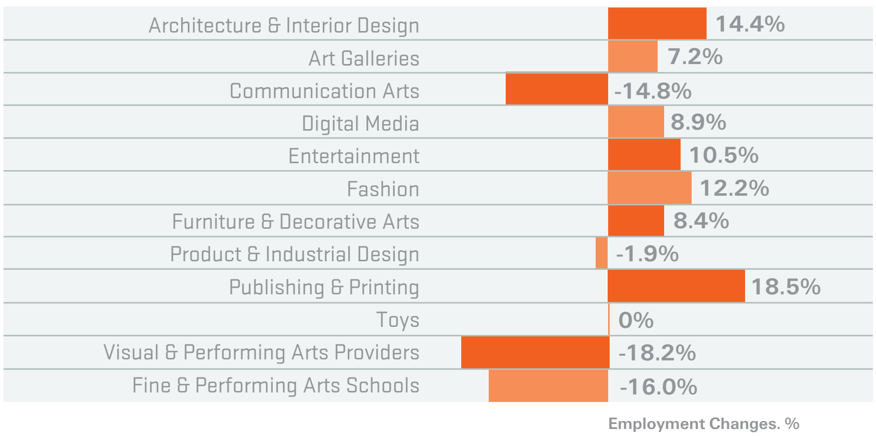
Overall, Central Coast employment in the creative sectors has increased relative to five years ago (up 3.4%, see Table 29). The largest expansions in both numerical and percentage terms have been in digital media, which added 1,013 jobs to grow by 74%, and furniture and digital media, which added 538 jobs to grow by 30%. A few sectors experienced comparable declines. Publishing and printing, which also saw declines elsewhere in the state, lost 789 jobs, while art galleries lost nearly half of their employment.

One-Year Trends

Overall employment in the Central Coast's creative industries increased by 6.8% in 2014 despite large year-over-year employment losses in visual and performing arts, fine and performing arts schools, and communication arts.[13] Double-digit growth in publishing and printing, architecture and interior design, fashion, and entertainment helped to counterbalance these job losses.

13
It is not uncommon for employment data to be suppressed for confidentiality or not of a reportable quality. Such data problems may account for the large employment loss for visual and performing arts providers shown here.

CREATIVE INDUSTRIES EMPLOYMENT GROWTH, CENTRAL COAST, 2013–2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

In line with the recent employment increases, the total number of creative industry establishments rose recently in the Central Coast region (see Table 30). Visual and performing arts providers, which added 22 firms, led the way, followed closely by architecture and interior design, which added 17 firms. Only one industry experienced a net decline in the number of firms, communication arts, which lost 12 firms in 2014.

Total direct labor income in the creative industries of the Central Coast region amounted to $977 million in 2014 (see Table 30). The digital media sector contributed the largest share (24%) to total creative sector payrolls, followed closely by publishing and printing (20%). Furniture and decorative arts was the third largest contributor at 11%.

TABLE 30:
ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, CENTRAL COAST, 2013 – 2014

Central Coast Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	335	5.3%	89.5	9.2%
Art Galleries	54	1.9%	5.6	0.6%
Communication Arts	230	-5.0%	62.4	6.4%
Digital Media	45	0.0%	236.7	24.2%
Entertainment	243	1.3%	94.3	9.7%
Fashion	155	3.3%	66.4	6.8%
Furniture and Decorative Arts	176	2.3%	106.1	10.9%
Product and Industrial Design	16	6.7%	15.8	1.6%
Publishing and Printing	300	1.7%	197.6	20.2%
Toys	18	12.5%	12.8	1.3%
Visual and Performing Arts Providers	371	6.3%	80.2	8.2%
Fine and Performing Arts Schools	75	1.4%	9.5	1.0%
TOTAL	2,018	2.5%	977.0	100.0%

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 13,825 self-employed creative workers in the Central Coast region. Approximately 70% were engaged in visual and performing arts or communication arts. Many of these workers may also be included in the wage-and-salary employment counts and thus are not additive.

TABLE 31:
NONEMPLOYER FIRMS, CENTRAL COAST, 2013

Central Coast Creative Industries	Self-Employed 2013
Architecture and Interior Design	1,119
Art Galleries	149
Communication Arts	4,323
Digital Media	---
Entertainment	1,148
Fashion	576
Furniture and Decorative Arts	232
Product and Industrial Design	---
Publishing and Printing	891
Toys	58
Visual and Performing Arts Providers	5,329
Fine and Performing Arts Schools	---
TOTAL	13,825

THE CREATIVE INDUSTRIES IN CONTEXT

- With 14,974 direct jobs, employment in the Central Coast creative sector in 2014 accounted for 2.1% of total creative-industry employment in the state.
- This wage and salary employment accounted for 2% of total nonfarm wage and salary employment in the Central Coast region. Compared to strictly non-creative employment in the largest (by a slight margin) metropolitan area in the region (the Oxnard-Thousand Oaks-Ventura metropolitan statistical area), this was:

    - almost as many employees as in the **Finance and Insurance** sector (14,200),
    - a little less than half the size of **Total Farm** employment (25,600),
    - roughly a third the size of the **Government** sector (43,800).

Regional Councils and Commissions:

- Arts Council for Monterey County www.arts4mc.org
- San Luis Obispo County Arts Council www.sloartscouncil.org
- Arts Obispo www.artsobispo.org
- Santa Barbara County Arts Commission www.sbartscommission.org
- Ventura County Arts Council www.venturacountyartscouncil.org

INLAND EMPIRE

With 4.3 million people, the Inland Empire region is home to approximately 11% of the state's population. Although it only hosts about 4% of the state's total creative industry employment, it has an outsize presence in furniture and decorative arts (12% of the statewide total employment in the industry). The region has about 20% more employees working for firms than self-employed in the creative industries.

The Inland Empire includes the counties of :

Riverside
San Bernardino

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The Inland Empire region had 23,375 wage and salary workers directly employed in creative industries in 2014, accounting for 2% of total wage and salary employment in the region. By sector, the largest employment counts were in furniture and decorative arts (9,035 jobs accounting for 13% of statewide employment in the sector), fashion (3,969 jobs accounting for 3% of statewide employment in the sector) and publishing and printing (3,473 jobs accounting for 2% of statewide employment in the sector). Four other sectors each contributed more than a thousand additional jobs.

TABLE 32:
CREATIVE INDUSTRIES EMPLOYMENT, INLAND EMPIRE, 2009 – 2014

	Avg. Number of Jobs		2009-2014 Change	
Inland Empire Creative Industries	2009	2014	Number	Percent
Architecture and Interior Design	1,718	1,802	84	4.9%
Art Galleries	134	81	-53	-39.6%
Communication Arts	888	1,180	292	32.9%
Digital Media	108	286	178	164.8%
Entertainment	1,910	1,363	-547	-28.6%
Fashion	2,779	3,969	1,190	42.8%
Furniture and Decorative Arts	8,580	9,035	455	5.3%
Product and Industrial Design	0	96	96	100.0%
Publishing and Printing	4,021	3,473	-548	-13.6%
Toys	242	247	5	2.1%
Visual and Performing Arts Providers	1,861	1,843	-18	-1.0%
Fine and Performing Arts Schools	0	0	0	--
TOTAL	22,241	23,375	1,134	5.1%

EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

Five-Year Trends

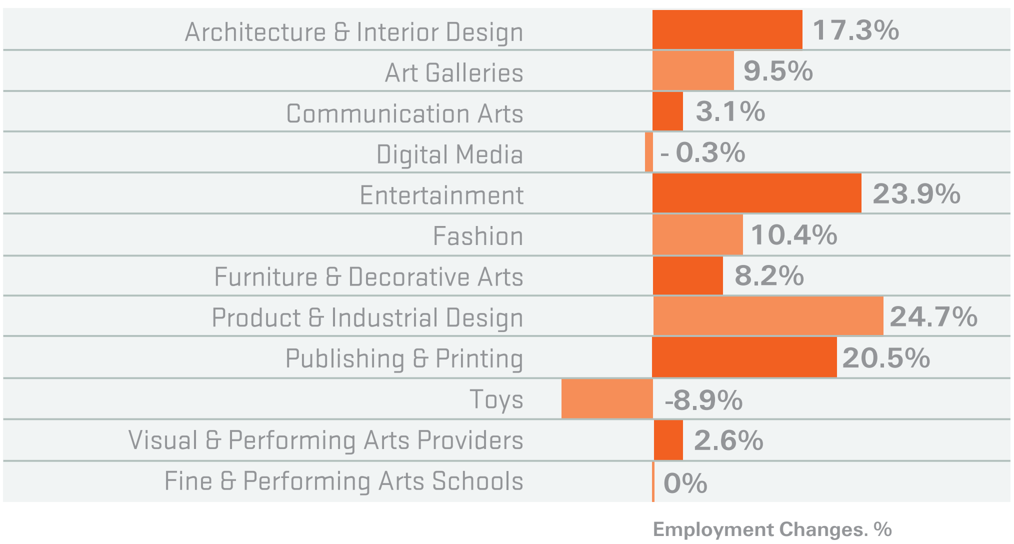
Inland Empire employment in the creative sectors has increased relative to five years ago (up by 5.1%, see Table 32). The largest gain was in fashion, which has added nearly 1,200 jobs on net since 2009, followed by furniture and decorative arts which added 455 jobs during the same period. However, four sectors lost jobs, led by publishing and printing (-548 jobs) and entertainment (-547 jobs).[14]

14
Employment data reported as zero, such as for fine and performing arts schools in this region, may not necessarily mean there is zero employment. It may also mean that data was suppressed or not of a reportable quality.

One-Year Trends

Most of the creative sectors in the Inland Empire grew over the last year, with the exception of toys and (barely) digital media. Half of the ten sectors with positive growth saw double-digit increases over this period, and three—product and industrial design, entertainment, and publishing and printing—experienced growth rates over 20%. The largest industry, furniture and decorative arts, saw growth of 8.2% on a base of over 8,500 jobs.

CREATIVE INDUSTRIES EMPLOYMENT GROWTH, INLAND EMPIRE, 2013– 2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

The total number of creative-industry establishments in the Inland Empire region has risen in line with employment growth recently (up 6.6%, see Table 33). Growth was led by publishing and printing, which added 53 new firms, on net, for a growth rate of 15%. Solid firm growth was also seen in furniture and decorative arts, which added 28 new firms, fashion, which added 19 new firms, and architecture and interior design, which added 12 new firms.

Total direct labor income was reported at $1.0 billion in 2014 (see Table 33). At $372 million, the furniture and decorative arts sector contributed the largest share (36%) to total reported creative sector payrolls, followed by fashion ($155 million and 15%) and publishing and printing ($143 million and 14%).

TABLE 33: ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, INLAND EMPIRE, 2013 – 2014

Inland Empire Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	279	4.5%	101.6	9.8%
Art Galleries	31	6.9%	3.4	0.3%
Communication Arts	253	0.0%	47.0	4.5%
Digital Media	20	-4.8%	26.7	2.6%
Entertainment	126	0.8%	92.7	8.9%
Fashion	309	6.6%	155.1	15.0%
Furniture and Decorative Arts	399	7.5%	372.1	35.9%
Product and Industrial Design	16	---	5.8	0.6%
Publishing and Printing	412	14.8%	143.2	13.8%
Toys	24	0.0%	11.6	1.1%
Visual and Performing Arts Providers	191	7.3%	76.9	7.4%
Fine and Performing Arts Schools	59	5.4%	0.0	0.0%
TOTAL	2,119	6.6%	1,036.2	100.0%

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 17,652 self-employed creative workers in the Inland Empire region, accounting for about 45% of the reported creative-industry employment. As with most other regions, a large share of nonemployers (70%) worked in the visual and performing arts or communication arts sectors. Many of these workers may also be included in the wage-and-salary employment count and thus are not additive.

TABLE 34: NONEMPLOYER FIRMS, INLAND EMPIRE, 2013

Inland Empire Creative Industries	Self-Employed 2013
Architecture and Interior Design	1,369
Art Galleries	135
Communication Arts	5,011
Digital Media	---
Entertainment	951
Fashion	1,074
Furniture and Decorative Arts	544
Product and Industrial Design	---
Publishing and Printing	1,114
Toys	139
Visual and Performing Arts Providers	7,315
Fine and Performing Arts Schools	---
TOTAL	17,652

THE CREATIVE INDUSTRIES IN CONTEXT

- With 23,375 direct jobs, employment in the Inland Empire creative sector in 2014 accounted for 3.2% of total creative-industry employment in the state.
- This wage and salary employment accounted for 1.7% of total nonfarm wage and salary employment in the Inland Empire region. Compared with strictly non-creative employment in the region (Riverside-San Bernardino-Ontario MSA), this was:
    - approximately the same size as the **Federal Government** sector (20,200),
    - about half the size of the **Financial Activities** sector (42,700),
    - roughly a tenth the size of the **State and Local Government** sector (208,600).

Regional Councils and Commissions:

- Riverside Arts Council www.riversideartscouncil.com
- The Arts Council of San Bernardino County (Arts Connection) www.artconnectionnetwork.org

CENTRAL VALLEY

The Central Valley includes the counties of :

Alpine
Amador
Calaveras
Bakersfield-Delano
Fresno
Hanford-Corcoran
Inyo
Madera-Chowchilla
Mariposa
Merced
Modesto
Mono
Visalia-Porterville
Tuolumne

With 3.5 million people, the Central Valley region is home to 9% of the state's population. A highly productive agricultural region, it hosts only 1.6% of the state's total creative industry employment. It does, however, have an outsized presence in fine and performing arts schools and architecture and interior design (each 3% of statewide total employment in the industry). The region has about 20% more self-employed workers than employees working for firms in the creative industries.

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The Central Valley region had 7,083 wage and salary workers directly employed in creative industries in 2014, accounting for 0.6% of total wage and salary employment in the region. By sector, the largest employment counts were in publishing and printing (1,842 jobs accounting for 1% of statewide employment in the sector), and furniture and decorative arts (1,826 jobs accounting for 3% of statewide employment in the sector). The Central Valley region is also home to 4% of statewide wage and salary employment in fine and performing arts schools.

**TABLE 35:
CREATIVE INDUSTRIES EMPLOYMENT,
CENTRAL VALLEY, 2009 – 2014**

Central Valley Creative Industries	Avg. Number of Jobs		2009-2014 Change	
	2009	2014	Number	Percent
Architecture and Interior Design	905	963	58	6.4%
Art Galleries	0	0	0	--
Communication Arts	839	504	-335	-39.9%
Digital Media	49	10	-39	-79.6%
Entertainment	1,045	1,137	92	8.8%
Fashion	341	311	-30	-8.8%
Furniture and Decorative Arts	1,369	1,826	457	33.4%
Product and Industrial Design	0	0	0	--
Publishing and Printing	2,308	1,842	-466	-20.2%
Toys	11	0	-11	-100.0%
Visual and Performing Arts Providers	413	74	-339	-82.1%
Fine and Performing Arts Schools	278	416	138	49.6%
TOTAL	7,558	7,083	-475	-6.3%

EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

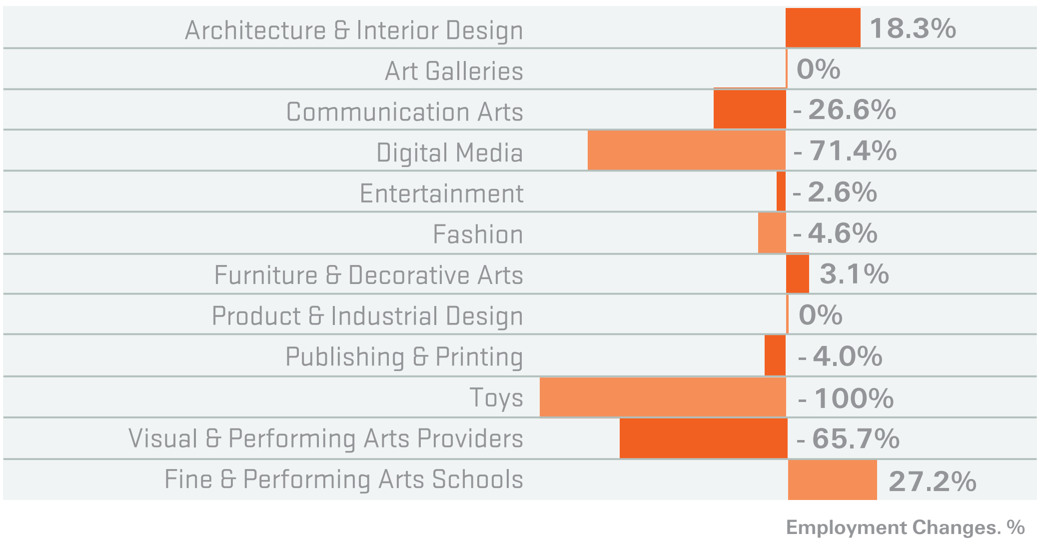
Five-Year Trends

Overall, Central Valley employment in the creative sectors has declined relative to five years ago (down 6.3%, see Table 35). The largest numerical decline was in publishing and printing, which has lost over 450 jobs since 2009 due to technological change, followed closely by visual and performing arts providers (-339 jobs) and communication arts (-335 jobs). Two sectors experienced double-digit percentage growth: fine and performing arts schools (49.6%), and furniture and decorative arts (33.4%).

One-Year Trends

The downward employment trends have continued more recently, with all but three of the Central Valley's creative sectors experiencing year-over-year employment declines in 2014. Four sectors saw employment declines of more than twenty percent: toys, digital media, visual and performing arts providers, and communication arts. Because the most recent nonemployer data only cover 2013, it remains to be seen whether these workers left the region entirely or simply shifted out of wage and salary employment within their creative industry.

CREATIVE INDUSTRIES EMPLOYMENT GROWTH, CENTRAL VALLEY, 2013–2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

In contrast to the recent employment declines, the total number of creative-industry establishments has risen recently in Central Valley (see Table 36). This overall growth was led by an increase of nine firms (18% growth) in the fine and performing arts schools sector, followed by publishing and printing (up by 7 firms) and furniture and decorative arts (up by 6 firms). Several segments showed increases in the number of establishments despite decreases in employment.

Total direct labor income in the creative industries of the Central Valley region amounted to $390 million in 2014 (see Table 36), up from $333 million in 2009. The entertainment industry contributed the largest share (40%) to total creative sector payrolls, followed by the publishing and printing sector (20%), furniture and decorative arts (17%), and architecture and interior design (14%).

TABLE 36: ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, CENTRAL VALLEY, 2013 – 2014

Central Valley Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	180	1.7%	55.4	14.2%
Art Galleries	8	-20.0%	0.0	0.0%
Communication Arts	159	-2.5%	20.8	5.3%
Digital Media	14	-6.7%	0.8	0.2%
Entertainment	105	4.0%	155.5	39.8%
Fashion	69	-2.8%	8.9	2.3%
Furniture and Decorative Arts	167	3.7%	65.0	16.7%
Product and Industrial Design	5	25.0%	0.0	0.0%
Publishing and Printing	243	3.0%	76.4	19.6%
Toys	9	-10.0%	0.0	0.0%
Visual and Performing Arts Providers	109	0.9%	1.5	0.4%
Fine and Performing Arts Schools	58	18.4%	6.0	1.5%
TOTAL	1,126	1.9%	390.4	100.0%

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 8,838 self-employed creative workers in the Central Valley region. Approximately 71% were in engaged in visual and performing arts or communication arts. Many of these workers may also be included in the wage-and-salary count and thus are not additive.

TABLE 37: NONEMPLOYER FIRMS, CENTRAL VALLEY, 2013

Central Valley Creative Industries	Self-Employed 2013
Architecture and Interior Design	808
Art Galleries	95
Communication Arts	2,619
Digital Media	---
Entertainment	376
Fashion	404
Furniture and Decorative Arts	175
Product and Industrial Design	---
Publishing and Printing	639
Toys	48
Visual and Performing Arts Providers	3,674
Fine and Performing Arts Schools	---
TOTAL	8,838

THE CREATIVE INDUSTRIES IN CONTEXT

- With 7,083 direct jobs, employment in the Central Valley creative sector in 2014 accounted for 1.0% of total creative industry employment in the state.
- This wage and salary employment accounted for 0.6% of total nonfarm wage and salary employment in the Central Valley region. Compared with strictly non-creative employment in the largest metropolitan area in the region (the Fresno metropolitan statistical area), this was:
    - more employees than in **Nursing and Residential Care Facilities** (7,100) or **Food and Beverage Stores** (7,200 jobs).
    - roughly half the size of **Financial Activities** (12,900) or **Construction** (13,100).
    - a little more than a tenth the size of **Trade, Transportation and Utilities** (60,700) or **Government** (64,200, all levels).

Regional Councils and Commissions:

- Amador County Arts Council www.amadorarts.org
- Calaveras Arts Council www.calaverasarts.org
- Fresno Arts Council www.fresnoartscouncil.org
- Inyo Council for the Arts www.inyo.org
- The Arts Council of Kern www.kernarts.org
- Madera County Arts Council www.maderaarts.org
- Mariposa County Arts Council www.mariposaartscouncil.org
- Merced County Arts Council www.artsmerced.org
- Mono Council for the Arts www.monoarts.org
- Tulare Arts Consortium www.artsconsortium.org
- Tuolumne County Arts Alliance www.tuolumnecountyarts.org

SAN DIEGO-IMPERIAL VALLEY

The San Diego/Imperial Valley region includes the counties of :

Imperial
San Diego

With 3.4 million people, the San Diego/Imperial Valley region is home to 9% of the state's population and 5.5% of the state's total creative industry employment. It has a strong design element, with an outsize presence in product and industrial design (11% of statewide total employment in the industry), and architecture and interior design (9% of the statewide total). The region's creative self-employed sector is only about three-quarters the size of the region's creative wage-and-salary sector.

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The San Diego/Imperial Valley region had 32,573 wage and salary workers directly employed in creative industries in 2014, accounting for 2.3% of total wage and salary employment in the region. By sector, the largest employment counts were in publishing and printing (7,261 jobs accounting for 5% of statewide employment in the sector) and digital media (4,116 jobs accounting for 7% of statewide employment in the sector). However, six other sectors each contributed between two and four thousand additional jobs (see Table 38), underscoring the diversity of the region's creative sector.

TABLE 38: CREATIVE INDUSTRIES EMPLOYMENT, SAN DIEGO-IMPERIAL VALLEY, 2009 – 2014

San Diego/Imperial Valley Creative Industries	Avg. Number of Jobs		2009-2014 Change	
	2009	2014	Number	Percent
Architecture and Interior Design	3,432	3,646	214	6.2%
Art Galleries	283	175	-108	-38.2%
Communication Arts	2,454	2,763	309	12.6%
Digital Media	4,191	4,116	-75	-1.8%
Entertainment	1,980	2,378	398	20.1%
Fashion	4,429	3,691	-738	-16.7%
Furniture and Decorative Arts	3,867	3,505	-362	-9.4%
Product and Industrial Design	262	227	-35	-13.4%
Publishing and Printing	9,137	7,261	-1,876	-20.5%
Toys	333	296	-37	-11.1%
Visual and Performing Arts Providers	3,957	3,658	-299	-7.6%
Fine and Performing Arts Schools	378	857	479	126.7%
TOTAL	34,703	32,573	-2,130	-6.1%

EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

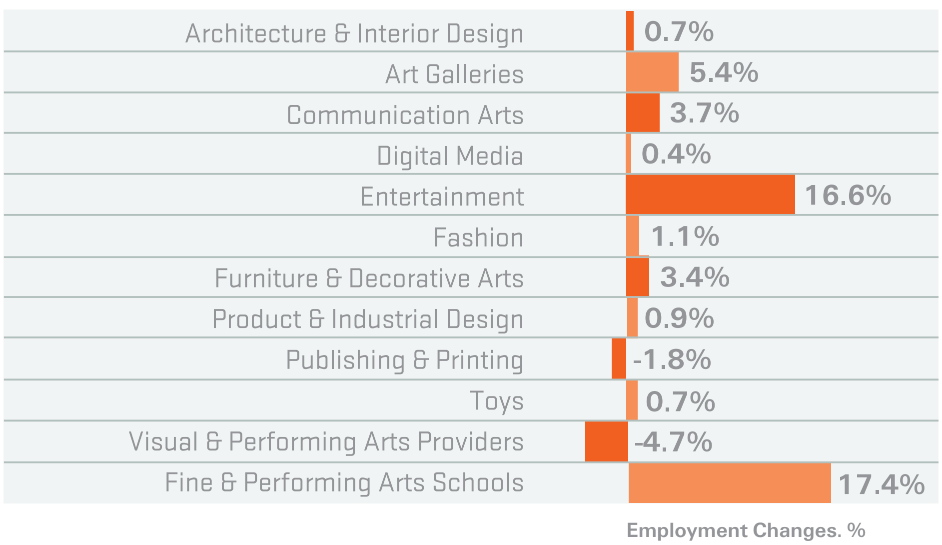
Five-Year Trends

Overall, San Diego-Imperial Valley employment in the creative sectors has declined relative to five years ago (down 6.1%, see Table 38). The largest numerical decline was in publishing and printing, which has lost nearly 2,000 jobs since 2009 due to technological change, while the art gallery sector was the hardest hit in percentage terms, declining by 38%. More moderate declines were widespread, as many manufacturing sectors felt the effects of outsourcing and technological change. Not all sectors contracted over this period, however. Entertainment and communication arts both posted double-digit growth, and fine and performing arts schools more than doubled their employment.

One-Year Trends

More recently, employment in the creative industries has been rising again as the San Diego-Imperial Valley region leaves the long-term effects of recession behind. All but two of the creative sectors (visual and performing arts providers, and publishing and printing) experienced year-over-year employment growth in 2014, and the losses in publishing and printing were smaller last year than in any other year in the comparison period (since 2009). Visual and performing arts providers, however, were hurt by a well-documented decline in performing arts attendance nationwide, although San Diego institutions are part of the movement to reverse this trend through active audience development.

CREATIVE INDUSTRIES EMPLOYMENT GROWTH,
SAN DIEGO-IMPERIAL VALLEY, 2013 – 2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

In line with recent upticks in employment, the total number of creative industry establishments has risen in the San Diego-Imperial Valley region (see Table 39). Three sectors experienced double-digit growth in firms last year. Fine and performing art schools led the way, adding 16 establishments for a growth rate of 15%. Digital media added 12 firms for a growth rate of 12%, and the relatively small toy sector added four firms for a growth rate of 11%. However, it was the much larger communication arts sector that added the most new creative-industry firms to the region (33), accounting for 17% of firm growth in the creative industries.

Total direct labor income in the creative industries of the San Diego-Imperial Valley region amounted to $2.1 billion in 2014 (see Table 39), up from $2.0 billion in 2009. At half a billion dollars, the digital media sector contributed the largest share (26%) to total creative sector payrolls, followed closely by the publishing and printing sector (21%). Architecture and Interior Design was the third largest contributor at 12.3%.

TABLE 39:
ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, SAN DIEGO-IMPERIAL VALLEY, 2013 – 2014

San Diego/Imperial Valley Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	605	4.0%	260.0	12.3%
Art Galleries	53	3.9%	6.1	0.3%
Communication Arts	528	6.7%	149.0	7.1%
Digital Media	109	12.4%	550.6	26.1%
Entertainment	213	6.5%	146.9	7.0%
Fashion	392	6.8%	168.9	8.0%
Furniture and Decorative Arts	366	7.0%	162.6	7.7%
Product and Industrial Design	34	6.3%	21.6	1.0%
Publishing and Printing	591	1.9%	445.1	21.1%
Toys	41	10.8%	19.9	0.9%
Visual and Performing Arts Providers	343	9.6%	157.9	7.5%
Fine and Performing Arts Schools	123	15.0%	18.7	0.9%
TOTAL	3,398	6.1%	2,107.4	100.0%

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 23,938 self-employed creative workers in the San Diego-Imperial Valley region. Approximately 75% were involved in the visual and performing arts (particularly independent artists, writers and performers) or communication arts. Many of these workers may also be included in the wage-and-salary count and thus are not additive.

TABLE 40:
NONEMPLOYER FIRMS, SAN DIEGO-IMPERIAL VALLEY, 2013

San Diego/Imperial Valley Creative Industries	Self-Employed 2013
Architecture and Interior Design	1,590
Art Galleries	208
Communication Arts	7,909
Digital Media	---
Entertainment	1,261
Fashion	973
Furniture and Decorative Arts	407
Product and Industrial Design	---
Publishing and Printing	1,425
Toys	72
Visual and Performing Arts Providers	10,093
Fine and Performing Arts Schools	---
TOTAL	23,938

THE CREATIVE INDUSTRIES IN CONTEXT

- With 32,573 direct jobs, employment in the San Diego-Imperial Valley creative sector in 2014 accounted for 4.5% of total creative industry employment in the state.
- This wage and salary employment accounted for 2.3% of total nonfarm wage and salary employment in the San Diego/Imperial Valley region. Compared with strictly non-creative employment in the major metropolitan area in the region (the San Diego-Carlsbad metropolitan statistical area), this was:
    - more employees than in **Scientific Research and Development Services** (30,500) or the combined **Aerospace Product and Parts Manufacturing** and **Computer and Electronic Product Manufacturing** (including aerospace navigational manufacturing) sub-industries (31,200 across both),
    - roughly half the size of **Construction** (60,900) or **Financial Activities** (71,400),
    - roughly a quarter the size of **Accommodation and Food Services** (142,700 jobs) or **Health Care and Social Assistance** (151,200 jobs).

Regional Councils and Commissions:

- Commission for Arts and Culture, City of San Diego
  www.sandiego.gov/arts-culture

LOS ANGELES-ORANGE COUNTY

The Southern California Region includes the counties of :

Los Angeles
Orange

With 13 million people, the Los Angeles-Orange County region is home to 34% of the state's population. A highly creative region, it hosts 56% of the state's total creative industry employment. It has an outsize presence in both entertainment and fashion (each 80% of the statewide total employment in the industry), as well as toys (67% of the statewide total). It is one of three regions in the state with more than twice as many employees working for firms versus being self-employed in the creative industries.

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The Los Angeles-Orange County region had 418,149 wage and salary workers directly employed in creative industries in 2014, accounting for 8.4% of total wage and salary employment in the region. By sector, the largest employment counts were in entertainment (137,276 jobs accounting for 83% of statewide employment in the sector) and fashion (104,036 jobs accounting for 82% of statewide employment in the sector). However, six other sectors contributed at least ten thousand additional jobs each (see Table 41), highlighting the strength and diversity of the region's creative sector.

TABLE 41:
CREATIVE INDUSTRIES EMPLOYMENT, LOS ANGELES-ORANGE COUNTY, 2009 – 2014

Los Angeles-Orange County Creative Industries	Avg. Number of Jobs		2009-2014 Change	
	2009	2014	Number	Percent
Architecture and Interior Design	16,334	17,275	941	5.8%
Art Galleries	1,126	954	-172	-15.3%
Communication Arts	22,330	24,162	1,832	8.2%
Digital Media	10,134	11,323	1,189	11.7%
Entertainment	132,066	137,276	5,210	3.9%
Fashion	97,529	100,213	2,684	2.8%
Furniture and Decorative Arts	37,983	36,756	-1,227	-3.2%
Product and Industrial Design	1,053	911	-142	-13.5%
Publishing and Printing	51,508	45,077	-6,431	-12.5%
Toys	5,085	5,137	52	1.0%
Visual and Performing Arts Providers	27,571	34,132	6,561	23.8%
Fine and Performing Arts Schools	4,003	4,933	930	23.2%
TOTAL	406,722	418,149	11,427	2.8%

EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

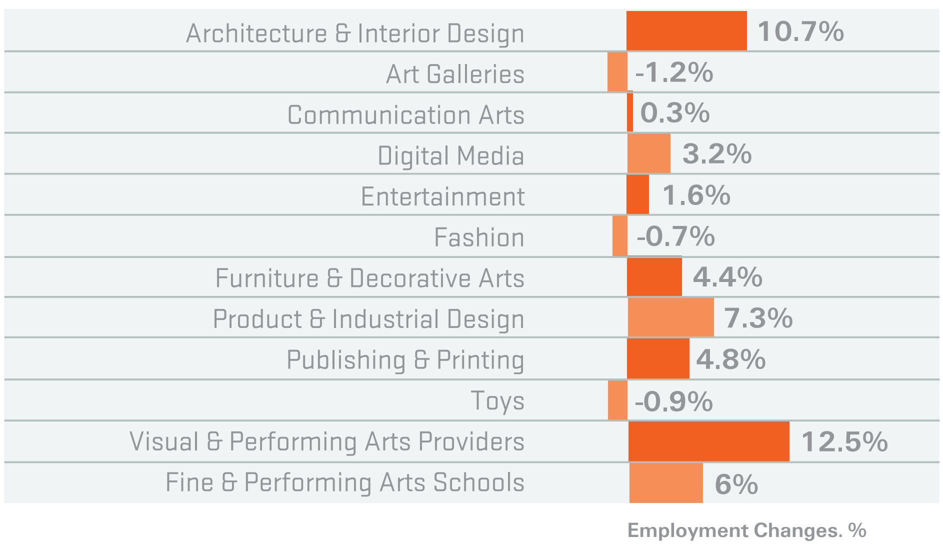
Five-Year Trends

Overall, Los Angeles-Orange County employment in the creative sectors has increased slightly relative to five years ago (up 2.8%, see Table 41). The largest numerical gain was in visual and performing arts, which added over 6,500 jobs since 2009, followed closely by entertainment, which added just over 5,200 jobs over the same period. Visual and performing arts providers also performed the best in percentage terms, growing by 23.8%, followed closely by fine and performing arts schools with 23.2% growth. The largest employment losses were in publishing and printing, which lost over 6,400 jobs.

One-Year Trends

More recently, however, employment in almost all of Los Angeles-Orange County's creative industries has been rising again as the local economy gathers steam. Three creative sectors experienced small year-over-year employment declines in 2014. Art galleries lost 12 jobs, fashion lost 680 jobs and toys lost 47 jobs. By contrast, two sectors experienced double-digit growth rates on relatively high bases (architecture and interior design, and visual and performing arts providers) adding nearly 5,500 new jobs to the economy.

CREATIVE INDUSTRIES EMPLOYMENT GROWTH, LOS ANGELES-ORANGE COUNTY, 2013 – 2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

In line with the recent employment gains, the total number of creative industry establishments has risen recently in Los Angeles-Orange County (see Table 42). Four sectors experienced double-digit growth in firms last year. Entertainment led the way, adding 851 establishments for a growth rate of 14%. This was followed closely by visual and performing arts providers, which added 1,092 firms (the most for a single sector, and more than a third of all new firms, on net) for a growth rate of 12%. The digital media sector grew at about 13%, while fine and performing arts schools grew at 12%, adding 38 and 63 establishments, respectively.

Total direct labor income in the creative industries of the Los Angeles-Orange County region amounted to $36.2 billion in 2014 (see Table 42), up from $31.0 billion in 2009. At $15.1 billion, the entertainment sector contributed the largest share (42%) to total creative sector payrolls. Visual and performing arts providers followed at a distance, contributing 17%, and fashion came in third, contributing 12%.

TABLE 42:
ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, LOS ANGELES-ORANGE COUNTY, 2013 – 2014

Los Angeles-Orange County Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	2,577	9.2%	1,370.7	3.8%
Art Galleries	281	9.3%	61.8	0.2%
Communication Arts	2,925	6.6%	2,203.0	6.1%
Digital Media	326	13.2%	1,591.4	4.4%
Entertainment	6,957	13.9%	15,060.9	41.6%
Fashion	7,806	4.9%	4,439.4	12.3%
Furniture and Decorative Arts	2,105	2.4%	1,686.1	4.7%
Product and Industrial Design	165	7.8%	71.7	0.2%
Publishing and Printing	2,763	2.9%	3,030.2	8.4%
Toys	281	0.7%	559.4	1.5%
Visual and Performing Arts Providers	9,812	12.5%	5,983.3	16.5%
Fine and Performing Arts Schools	603	11.7%	143.2	0.4%
TOTAL	36,601	8.8%	36,201.0	100.0%

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 166,404 self-employed creative workers in the Los Angeles-Orange County region. Approximately 86% were associated with visual and performing arts (particularly independent artists, writers and performers), communication arts, or entertainment. Many of these workers may also be included in the wage-and-salary employment count and thus are not additive.

TABLE 43:
NONEMPLOYER FIRMS, LOS ANGELES-ORANGE COUNTY, 2013

Los Angeles-Orange County Creative Industries	Self-Employed 2013
Architecture and Interior Design	6,636
Art Galleries	856
Communication Arts	35,431
Digital Media	---
Entertainment	21,653
Fashion	7,978
Furniture and Decorative Arts	2,112
Product and Industrial Design	---
Publishing and Printing	5,552
Toys	531
Visual and Performing Arts Providers	85,655
Fine and Performing Arts Schools	---
TOTAL	166,404

THE CREATIVE INDUSTRIES IN CONTEXT

- With 418,149 direct jobs, employment in the Los Angeles-Orange County creative sector in 2014 accounted for 57.6% of total creative-industry employment in the state.
- This wage and salary employment accounted for approximately 7% of total nonfarm wage and salary employment in the Los Angeles-Orange County region. Compared with strictly non-creative employment in the major metropolitan area in the region (the Los Angeles-Long Beach-Glendale metropolitan division), this was:
    - slightly fewer employees than **Local Government** (420,500) or the combined **Transportation, Warehousing and Utilities, Financial Activities and Management of Companies and Enterprises** industries (427,400 jobs across the three),
    - approximately two-thirds the size of **Health Care and Social Assistance** (599,800).

Regional Councils and Commissions:

- City of Los Angeles Department of Cultural Affairs www.culturela.org
- Los Angeles County Arts Commission www.lacountyarts.org
- Arts Orange County www.artsoc.org

UPSTATE CALIFORNIA

With 1.1 million people, the Upstate California region is home to 3% of the state's population. Although it hosts only 1.1% of the state's total creative industry employment, it has an outsize presence in art galleries (4% of the statewide total employment in the industry), communication arts (2.5% of the statewide total), and visual and performing arts providers (2% of the statewide total). It is one of three regions in the state with more than twice as many employees working for firms versus being self-employed in the creative industries.

Upstate California includes the counties of :

- Butte
- Colusa
- Del Norte
- Glenn
- Humboldt
- Lake
- Lassen
- Mendocino
- Modoc
- Plumas
- Shasta
- Sierra
- Siskiyou
- Sutter
- Tehama
- Trinity
- Yuba

EMPLOYMENT IN THE CREATIVE INDUSTRIES

The Upstate California region had 1,243 wage and salary workers directly employed in creative industries in 2014, accounting for 0.4% of total wage and salary employment in the region. By sector, the largest employment counts were in furniture and decorative arts (375 jobs accounting for 1% of statewide employment in the sector), and publishing and printing (241 jobs accounting for less than 1% of statewide employment in the sector). Three other sectors each contributed over 100 additional jobs (see Table 44), providing a firm foundation for the region's creative sector.

TABLE 44:
CREATIVE INDUSTRIES EMPLOYMENT, UPSTATE CALIFORNIA, 2009-2014

Upstate California Creative Industries	Avg. Number of Jobs		2009-2014 Change	
	2009	2014	Number	Percent
Architecture and Interior Design	208	161	-47	-22.6%
Art Galleries	13	28	15	115.4%
Communication Arts	98	39	-59	-60.2%
Digital Media	0	0	0	--
Entertainment	191	111	-80	-41.9%
Fashion	129	71	-58	-45.0%
Furniture and Decorative Arts	320	375	55	17.2%
Product and Industrial Design	0	0	0	--
Publishing and Printing	340	241	-99	-29.1%
Toys	0	0	0	--
Visual and Performing Arts Providers	57	97	40	70.2%
Fine and Performing Arts Schools	136	120	-16	-11.8%
TOTAL	1,492	1,243	-249	-16.7%

EMPLOYMENT TRENDS IN THE CREATIVE INDUSTRIES

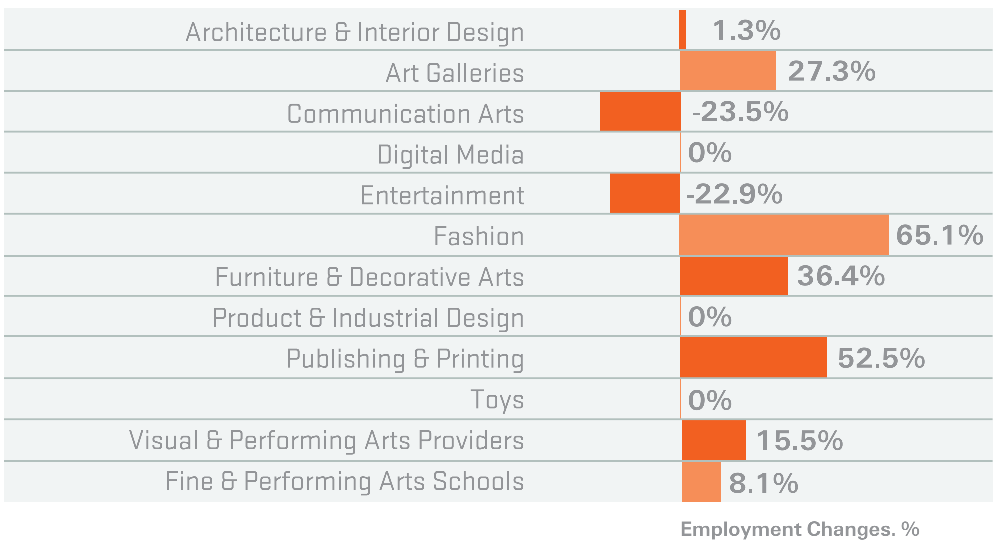
Five-Year Trends

Overall, Upstate California employment in the creative sectors has declined dramatically relative to five years ago (down 16.7%, see Table 44). The largest numerical decline was in publishing and printing, which has lost 99 jobs since 2009, followed closely by entertainment, which lost 80 jobs on net. The communication arts sector was the hardest hit in percentage terms, declining by 60%. Another four sectors experienced double-digit percentage declines, while only three sectors grew.

One-Year Trends

More recently, employment in the creative industries has been rising again in Upstate California. Only two creative sectors experienced year-over-year employment declines in 2014: communication arts and entertainment. On the other hand, five sectors experienced double-digit growth over the same period. It should be kept in mind, however, that small employment regions such as Upstate California can experience dramatic volatility as small industries take root and grow, so it remains to be seen whether this is the start of a longer-term trend.

CREATIVE INDUSTRIES EMPLOYMENT GROWTH, UPSTATE CALIFORNIA, 2013–2014



ESTABLISHMENTS AND PAYROLL IN THE CREATIVE INDUSTRIES

In contrast to the optimistic employment numbers, the total number of creative-industry establishments has declined recently in Upstate California (see Table 45). Visual and performing arts providers led the retreat with a loss of seven firms (a 12% decline), while entertainment and the architecture and interior design sector each lost five firms (for 9% and 7% declines, respectively). Only three sectors experienced growth in firms last year. The region's relatively strong publishing and printing sector added four firms (3.1% growth), while art galleries and fine and performing art schools added three establishments each (for 18% and 12% growth, respectively).

Total direct labor income in the creative industries of the Upstate California region amounted to $43 million in 2014 (see Table 45), down from $50 million in 2009. The furniture and decorative arts sector contributed the largest share (29%) to total creative sector payrolls, followed closely by the architecture and interior design sector (25%). Publishing and printing was the third largest contributor at 18%.

TABLE 45:
ESTABLISHMENT GROWTH AND PAYROLL CONTRIBUTION OF THE CREATIVE INDUSTRIES, UPSTATE CALIFORNIA, 2013 – 2014

Upstate California Creative Industries	Number of Firms 2014	Percent Growth from 2013	Payroll (millions) 2014	Percent Contribution
Architecture and Interior Design	65	-7.1%	10.8	25.1%
Art Galleries	20	17.6%	0.7	1.7%
Communication Arts	55	-3.5%	1.4	3.3%
Digital Media	7	-12.5%	0.0	0.0%
Entertainment	49	-9.3%	3.7	8.6%
Fashion	40	0.0%	3.2	7.4%
Furniture and Decorative Arts	89	0.0%	12.7	29.4%
Product and Industrial Design	0	---	0.0	0.0%
Publishing and Printing	134	3.1%	7.7	17.9%
Toys	3	-40.0%	0.0	0.0%
Visual and Performing Arts Providers	52	-11.9%	1.4	3.2%
Fine and Performing Arts Schools	28	12.0%	1.4	3.3%
TOTAL	542	-2.2%	43.0	100.0%

COUNTING THE SELF-EMPLOYED IN THE CREATIVE INDUSTRIES

A large number of creative people engage in self-employment. In 2013 (the latest year for which data are available), there were 10,675 self-employed creative workers in the Upstate California region. As with most other regions, approximately three out of four (74% in this region) were engaged in visual and performing arts or communication arts. Both of these sectors, along with fashion, art galleries, architecture and interior design, publishing and printing, and entertainment, had more self-employed workers than wage-and-salary employees. However, many of these workers may also be included in the wage-and-salary employment count and thus are not additive.

TABLE 46:
NONEMPLOYER FIRMS, UPSTATE CALIFORNIA, 2013

Upstate California Creative Industries	Self-Employed 2013
Architecture and Interior Design	754
Art Galleries	148
Communication Arts	3,087
Digital Media	---
Entertainment	590
Fashion	403
Furniture and Decorative Arts	202
Product and Industrial Design	---
Publishing and Printing	662
Toys	22
Visual and Performing Arts Providers	4,807
Fine and Performing Arts Schools	---
TOTAL	10,675

THE CREATIVE INDUSTRIES IN CONTEXT

- With 1,243 direct jobs, employment in the Upstate California creative sector in 2014 accounted for 0.2% of total creative-industry employment in the state.
- This wage and salary employment accounted for 0.3% of total nonfarm wage and salary employment in the Upstate California region. Compared with strictly non-creative employment in the largest metropolitan area in the region (the Chico metropolitan statistical area), this was:
    - fewer employees than in either **Transportation, Warehousing and Utilities** (1,500) or **Finance and Insurance** (1,500),
    - roughly a third the size of **Mining, Logging and Construction** (2,900), **Financial Activities** (2,800) or **Total Farm** employment (2,900).

Regional Councils and Commissions:
- Friends of the Arts Upstate www.friendsoftheartsupstate.squarespace.com/
- Colusa County Arts Council www.colusacountyartscouncil.org
- Del Norte Association for Cultural Awareness www.dnaca.net
- Humboldt Arts Council www.humboldtarts.org
- Lake County Arts Council www.lakecountyartscouncil.com
- Lassen County Arts Council www.lassencountyartscouncil.org
- Arts Council of Mendocino County www.artsmendocino.org
- Modoc County Arts Council www.modoccountyartscouncil.org
- Plumas County Arts Commission (Plumas Arts) www.plumasarts.org
- Shasta County Arts Council www.shastaartscouncil.org
- Sierra County Arts Council www.sierracountyartscouncil.org
- Siskiyou County Arts Council www.siskiyouarts.org
- Tehama County Arts Council www.tehamaarts.org
- Trinity Arts Council www.trinitycountyarts.com
- Yuba Sutter Arts www.yubasutterarts.org

HOW TO USE THIS REPORT

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 institutions.
- 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 strategies for attracting and retaining creative talent.
- To develop marketing and branding to promote creative assets both to businesses and as cultural tourism.
- To develop a support and networking structure that includes convening leadership committees and building collaborative connections across industries.

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.

NOTES ON METHODOLOGY & 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 third edition of that report. The data collected for this report include employment, the number of establishments, payroll activity, and other measures for all of the creative economy's component sectors in California. These data 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.

TABLE 47: ECONOMIC CONTRIBUTION OF CALIFORNIA'S CREATIVE INDUSTRIES, 2014

					Total (Direct, Indirect, Induced) Contribution			
Industry	Establishments	Jobs	Payroll ($billions)	Nonemployer Estab. (2013)	Output ($billions)	Total Jobs	Labor Income ($billions)	Taxes* ($millions)
Architecture and Interior Design	6,122	40,800	$3.2	17,903	$11.6	77,400	$5.1	$439.5
Art Galleries	637	2,200	0.1	2,378	0.2	3,000	0.2	$24.5
Communication Arts	5,996	44,900	3.9	83,906	13.8	80,200	5.7	$547.0
Digital Media	1,356	55,700	9.8	---	39.1	129,800	13.7	$1,364.2
Entertainment	8,741	166,300	17.9	30,853	104.4	323,200	26.5	$3,585.1
Fashion	9,524	120,800	5.1	14,326	40.6	208,000	10.2	$2,765.4
Furniture and Decorative Arts	4,508	71,100	3.4	5,076	24.5	124,000	6.4	$1,383.1
Product/Industrial Design	343	2,200	0.2	---	0.4	3,600	0.3	$24.0
Publishing and Printing	7,188	144,400	24.4	15,285	122.3	499,600	44.2	$4,224.6
Toys	482	7,300	0.7	1,165	2.9	15,500	1.2	$280.7
Visual and Performing Arts	12,356	55,700	7.1	155,109	13.8	105,800	9.7	$807.1
Fine and Performing Arts Schools	1,439	11,200	0.3	---	0.8	13,500	0.4	$33.7
Total	**58,692**	**722,600**	**$76.1**	**326,001**	**$374.5**	**1,583,600**	**$123.5**	**$15,478.8**

*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

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

TABLE 48:
CREATIVE INDUSTRIES EMPLOYMENT, 2009-2014

Creative Industry	NAICS Code	Avg. Number of Jobs (1,000s) 2009	2014	2009-2014 Change Number	Percent
Architecture and Interior Design:		**38.8**	**40.8**	**2.0**	**5.2%**
Architectural Services	54131	23.6	24.7	1.1	4.5%
Landscape Design	54132	6.1	6.3	0.3	4.9%
Drafting Services	54134	0.8	0.7	-0.1	-14.7%
Interior Design	54141	5.0	5.9	0.9	18.9%
Ornamental & Architectural Metal Work Mfg.	332323	3.4	3.2	-0.2	-5.2%
Art Galleries:	45392	**3.0**	**2.2**	**-0.8**	**-26.7%**
Communication Arts:		**40.6**	**44.9**	**4.3**	**10.7%**
Graphic Design	54143	10.8	10.9	0.0	0.3%
Advertising Agencies	54181	22.1	27.4	5.3	24.0%
Photography Studios, Portrait	541921	6.4	5.4	-1.1	-16.4%
Commercial Photography	541922	1.3	1.3	0.0	2.6%
Digital Media:		**44.3**	**55.7**	**11.4**	**25.8%**
Software Publishers	5112	44.3	55.7	11.4	25.8%
Entertainment:		**164.8**	**166.3**	**1.5**	**0.9%**
Motion Picture/Video Production	51211	105.1	111.5	6.3	6.0%
Motion Picture Distribution	51212	2.5	2.2	-0.3	-11.6%
Post-Production Services	51219	10.7	9.5	-1.1	-10.7%
Sound Recording	5122	4.0	3.7	-0.3	-6.9%
Radio Stations	515112	6.9	6.7	-0.2	-2.8%
Television Broadcasting	515120	15.8	19.6	3.8	24.1%
Cable Broadcasting	5152	19.9	13.1	-6.8	-34.0%
Fashion:		**119.8**	**120.8**	**0.9**	**0.8%**
Textile Mills Manufacturing	313	9.6	8.3	-1.3	-14.0%
Apparel Manufacturing	315	60.5	54.6	-5.8	-9.7%
Apparel Wholesaling	4243	28.8	37.6	8.8	30.7%
Footwear Manufacturing	3162	0.9	0.8	-0.1	-8.7%
Footwear Wholesaling	42434	5.1	6.0	0.9	17.8%
Women's Handbag Manufacturing	316992	0.1	0.1	0.0	41.9%
Cosmetics Manufacturing	32562	6.0	6.8	0.9	14.3%
Jewelry Manufacturing	33991	3.0	2.9	-0.1	-2.5%
Jewelry Wholesaling	42394	5.8	6.6	0.8	14.5%
Other Specialized Design Svc	54149	5.3	3.0	-2.3	-43.1%
Furniture and Decorative Arts:		**71.9**	**71.1**	**-0.8**	**-1.1%**
Textile Product Mills	314	10.3	8.6	-1.7	-16.3%
Furniture Manufacturing	337	34.4	33.7	-0.6	-1.9%
Furniture Wholesaling	4232	17.3	19.8	2.6	15.0%
Electric Lighting Fixtures	33512	6.9	6.7	-0.2	-2.9%
China Plumbing Fixtures, China, Earthenware	327111	0.1	---	---	----
Other China, Fine Earthenware & Pottery Mfg.	327112	0.8	---	---	----
Pressed & Blown Glass & Glassware Mfg.	327212	0.8	0.9	0.2	21.7%
Other Misc. Nonmetallic Mineral Product Mfg.	327999	1.5	1.3	-0.2	-10.5%
Product/Industrial Design:	54142	**2.4**	**2.2**	**-0.2**	**-7.0%**
Publishing and Printing:		**128.2**	**144.4**	**16.2**	**12.6%**
Printing and Related Support Activities	3231	48.2	41.9	-6.3	-13.0%
Book, Periodical, Newspaper Wholesalers	424920	5.5	3.8	-1.7	-30.2%
Newspaper Publishers	511110	20.1	13.8	-6.3	-31.3%
Periodical Publishers	511120	11.8	9.1	-2.6	-22.5%
Book Publishers	511130	7.7	6.0	-1.7	-22.5%
Greeting Card Publishers	511191	0.1	0.1	0.0	-25.3%
All Other Publishers	511199	1.4	1.2	-0.2	-16.5%
Libraries and Archives	519120	1.8	2.1	0.3	15.7%
Internet Publishing & Broadcasting	519130	31.5	66.3	34.8	110.2%
Toys:		**8.0**	**7.3**	**-0.6**	**-7.8%**
Toy Manufacturing	33993	2.7	2.6	-0.1	-5.3%
Toy Wholesaling	42392	5.2	4.8	-0.5	-9.1%
Visual and Performing Arts Providers:		**48.9**	**55.7**	**6.8**	**13.8%**
Theater Companies	71111	6.7	7.1	0.4	6.5%
Dance Companies	71112	1.1	1.1	0.0	1.2%
Musical Groups	71113	6.0	5.5	-0.4	-7.5%
Other Performing Arts Cos.	71119	0.3	0.3	-0.1	-16.2%
Agents & Managers of Artists, etc.	71141	7.2	9.1	1.9	26.8%
Independent Artists, Writers, etc.	71151	15.7	18.6	2.9	18.3%
Museums	71211	9.0	11.0	1.9	21.5%
Musical Instrument Manufacturing	339992	2.9	3.0	0.1	2.7%
Fine and Performing Arts Schools:		**8.8**	**11.2**	**2.3**	**26.2%**
Fine and Performing Arts Schools	61161	8.8	11.2	2.3	26.2%
TOTAL		**679.5**	**722.6**	**43.1**	**6.3%**

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

TABLE 49:
CREATIVE INDUSTRIES EMPLOYMENT YEAR-TO-YEAR COMPARISONS, 2009-2014

Creative Industry	NAICS Code	Employment, thousands 2009	2010	2011	2012	2013	2014	Annual percent change 2009	2010	2011	2012	2013	2014
Architecture and Interior Design:		**38.8**	**35.1**	**35.2**	**36.7**	**37.4**	**40.8**	**-21.4%**	**-9.4%**	**0.2%**	**4.1%**	**1.9%**	**9.2%**
Architectural Sevices	54131	23.6	21.6	21.8	22.4	22.9	24.7	-21.5%	-8.4%	0.6%	2.9%	2.1%	10.2%
Landscape Design	54132	6.1	5.4	5.6	5.9	5.7	6.3	-25.8%	-10.1%	2.7%	5.5%	-2.9%	7.6%
Drafting Services	541340	0.8	0.8	0.7	0.6	0.6	0.7	-17.4%	-1.5%	-13.6%	-2.7%	-0.2%	3.1%
Interior Design	54141	5.0	4.3	4.4	4.7	5.2	5.9	-22.1%	-13.5%	1.9%	6.2%	11.5%	27.0%
Ornamental & Architectural Metal Work Mfg.	332323	3.4	3.0	2.8	3.1	2.9	3.2	-10.6%	-10.9%	-6.5%	9.4%	-4.3%	4.0%
Art Galleries	45392	**3.0**	**2.1**	**2.0**	**2.2**	**2.2**	**2.2**	**-16.8%**	**-31.1%**	**-2.4%**	**8.0%**	**3.0%**	**1.0%**
Communication Arts:		**40.6**	**39.4**	**41.3**	**43.4**	**44.2**	**44.9**	**-11.8%**	**-2.9%**	**4.8%**	**5.0%**	**1.8%**	**3.6%**
Graphic Design	54143	10.8	10.1	10.3	10.3	10.2	10.9	-19.2%	-6.3%	1.3%	0.3%	-1.3%	5.3%
Advertising Agencies	54181	22.1	21.9	23.9	25.9	27.2	27.4	-8.4%	-1.1%	9.2%	8.6%	5.0%	5.7%
Photography Studios, Portrait	541921	6.4	6.2	6.0	6.0	5.4	5.4	-8.5%	-3.5%	-2.6%	-1.2%	-8.7%	-9.8%
Commercial Photography	541922	1.3	1.2	1.1	1.2	1.3	1.3	-15.7%	-3.1%	-6.2%	2.3%	10.9%	10.3%
Digital Media:		**44.3**	**44.7**	**47.3**	**51.2**	**53.5**	**55.7**	**2.5%**	**0.8%**	**5.8%**	**8.2%**	**4.5%**	**8.9%**
Software Publishers	5112	44.3	44.7	47.3	51.2	53.5	55.7	2.5%	0.8%	5.8%	8.2%	4.5%	8.9%
Entertainment:		**164.8**	**166.4**	**165.9**	**165.0**	**164.0**	**166.3**	**-8.2%**	**1.0%**	**-0.3%**	**-0.5%**	**-0.6%**	**0.8%**
Motion Picture/Video Production	51211	105.1	107.7	108.2	107.4	108.7	111.5	-10.4%	2.4%	0.5%	-0.8%	1.2%	3.8%
Motion Picture Distribution	51212	2.5	2.3	2.0	1.9	2.0	2.2	10.3%	-6.3%	-13.4%	-5.9%	6.3%	15.9%
Post Production Services	51219	10.7	11.3	11.4	11.0	10.4	9.5	-7.1%	5.5%	1.0%	-3.3%	-5.3%	-13.3%
Sound Recording	5122	4.0	3.9	4.0	4.1	3.4	3.7	-7.3%	-1.4%	2.6%	1.4%	-16.0%	-9.2%
Radio Stations	515112	6.9	6.9	7.0	6.9	6.8	6.7	-8.8%	-0.4%	1.1%	-0.9%	-2.0%	-2.6%
Television Broadcasting	515120	15.8	17.1	17.9	18.1	19.0	19.6	-6.1%	8.7%	4.3%	1.1%	5.0%	8.3%
Cable Broadcasting	5152	19.9	17.2	15.4	15.7	13.7	**13.1**	0.3%	-13.4%	-10.5%	1.7%	-12.7%	-16.3%
Fashion:		**119.8**	**115.9**	**114.9**	**116.7**	**120.1**	**120.8**	**-11.4%**	**-3.2%**	**-0.9%**	**1.6%**	**2.9%**	**3.5%**
Textile Mills Manufacturing	313	9.6	9.0	9.0	8.7	8.8	8.3	-12.8%	-6.4%	-0.4%	-3.0%	1.5%	-4.9%
Apparel Manufacturing	315	60.5	58.7	56.3	56.6	56.8	54.6	-14.4%	-2.9%	-4.2%	0.6%	0.4%	-3.4%
Apparel Wholesaling	4243	28.8	30.5	31.1	32.2	34.6	37.6	-5.7%	6.1%	1.8%	3.7%	7.4%	16.7%
Footwear Manufacturing	3162	0.9	0.9	1.0	1.0	0.9	0.8	-23.8%	-0.7%	18.6%	-3.4%	-12.8%	-19.8%
Footwear Wholesaling	42434	5.1	5.4	5.3	5.5	5.7	6.0	-6.8%	6.0%	-0.4%	3.6%	3.7%	7.8%
Women's Handbag Manufacturing	316992	0.1	0.1	0.1	0.1	0.1	0.1	-15.7%	18.6%	-2.9%	-16.2%	25.3%	47.0%
Cosmetics Manufacturing	32562	6.0	5.8	6.0	6.4	6.6	6.8	-10.5%	-2.5%	3.3%	6.3%	3.3%	6.8%
Jewelry Manufacturing	33991	3.0	2.6	2.7	2.7	2.8	2.9	-16.6%	-12.0%	1.6%	1.2%	3.7%	7.7%
Jewelry Wholesaling	42394	5.8	5.7	6.1	6.4	6.5	6.6	-8.9%	-0.3%	6.5%	4.0%	2.7%	3.7%
Other Specialized Design Svc	54149	5.3	2.5	2.7	2.7	2.9	3.0	-0.3%	-52.1%	6.4%	-0.4%	9.0%	12.0%
Furniture & Decorative Arts:		**71.9**	**66.8**	**65.0**	**65.8**	**68.6**	**71.1**	**-20.1%**	**-7.1%**	**-2.6%**	**1.3%**	**4.2%**	**8.0%**
Textile Product Mills	314	10.3	9.5	8.5	8.3	8.7	8.6	-16.0%	-8.0%	-10.1%	-2.2%	4.1%	3.6%
Furniture Manufacturing	337	34.4	31.3	31.1	31.1	32.3	33.7	-24.8%	-8.9%	-0.6%	0.1%	3.6%	8.2%
Furniture Wholesaling	4232	17.3	16.7	17.2	18.2	19.3	19.8	-14.0%	-3.1%	3.0%	5.8%	6.0%	8.9%
Electric Lighting Fixtures	33512	6.9	6.4	6.3	6.3	6.5	6.7	-17.6%	-6.6%	-2.4%	0.3%	2.6%	6.1%
China Plumbing Fixtures, China, Earthenware	327111	0.1	0.0	---	---	---	---	438.5%	-30.0%	---	---	---	---
Other China, Fine Earthenware & Pottery Mfg.	327112	0.8	0.7	---	---	---	---	-23.7%	-8.3%	---	---	---	---
Pressed & Blown Glass & Glassware Mfg.	327212	0.8	0.8	0.7	0.7	0.6	0.9	-21.2%	0.1%	-11.5%	-3.8%	-4.0%	42.7%
Other Misc. Nonmetallic Mineral Product Mfg.	327999	1.5	1.3	1.2	1.2	1.3	1.3	-9.2%	-11.9%	-5.9%	-1.1%	5.4%	9.1%
Product/Industrial Design	54142	**2.4**	**2.3**	**2.3**	**1.9**	**2.1**	**2.2**	**-22.1%**	**-4.6%**	**1.7%**	**-17.6%**	**12.9%**	**16.3%**
Publishing and Printing:		**128.2**	**114.4**	**118.6**	**121.4**	**131.2**	**144.4**	**-3.6%**	**-10.7%**	**3.6%**	**2.4%**	**8.0%**	**18.9%**
Printing and Related Support Activities	3231	48.2	37.9	39.3	38.7	37.4	41.9	4.3%	-21.3%	3.6%	-1.4%	-3.6%	8.2%
Book, Periodical, Newspaper Wholesalers	424920	5.5	4.7	4.5	4.2	4.1	3.8	-3.3%	-15.3%	-4.3%	-6.5%	-2.0%	-8.0%
Newspaper Publishers	511110	20.1	17.7	16.6	15.5	14.8	13.8	-19.4%	-12.0%	-6.4%	-6.5%	-4.8%	-10.9%
Periodical Publishers	511120	11.8	10.9	9.8	9.7	9.3	9.1	-13.0%	-7.7%	-9.6%	-1.7%	-3.6%	-5.4%
Book Publishers	511130	7.7	6.4	6.2	6.0	6.1	6.0	-9.5%	-17.1%	-2.6%	-3.9%	1.9%	-0.1%
Greeting Card Publishers	511191	0.1	0.1	0.1	0.1	0.1	0.1	-35.6%	-28.7%	6.5%	-3.0%	-1.6%	1.6%
All Other Publishers	511199	1.4	1.1	1.2	1.2	1.3	1.2	-12.8%	-18.4%	6.6%	3.9%	1.1%	-7.6%
Libraries and Archives	519120	1.8	1.9	1.7	1.8	2.1	2.1	-4.1%	3.1%	-8.3%	0.4%	19.2%	21.9%
Internet Publishing & Broadcasting	519130	31.5	33.8	39.1	44.3	56.1	66.3	3.6%	7.0%	16.0%	13.1%	26.8%	49.7%
Toys:		**8.0**	**7.4**	**6.9**	**7.1**	**7.4**	**7.3**	**-18.3%**	**-7.3%**	**-6.1%**	**1.9%**	**4.0%**	**3.9%**
Toy Manufacturing	33993	2.7	2.4	2.2	2.4	2.5	2.6	-25.0%	-11.5%	-7.4%	5.2%	6.3%	9.8%
Toy Wholesaling	42392	5.2	5.0	4.7	4.7	4.8	4.8	-14.3%	-5.2%	-5.4%	0.3%	2.8%	1.0%
Visual and Performing Arts Providers:		**48.9**	**48.5**	**51.0**	**52.1**	**53.9**	**55.7**	**-5.3%**	**-0.9%**	**5.3%**	**2.0%**	**3.5%**	**6.9%**
Theater Companies	71111	6.7	6.5	6.8	6.8	6.8	7.1	-7.9%	-2.7%	4.3%	0.4%	0.1%	4.6%
Dance Companies	71112	1.1	0.9	1.0	0.9	1.1	1.1	-11.6%	-13.6%	0.8%	-0.9%	11.7%	17.3%
Musical Groups	71113	6.0	5.6	5.5	5.6	5.6	5.5	-7.0%	-6.5%	-1.6%	0.9%	0.0%	-0.4%
Other Performing Arts Cos.	71119	0.3	0.4	0.6	0.4	0.4	0.3	19.7%	29.6%	51.8%	-40.0%	-4.4%	-28.9%
Agents & Managers of Artists, etc.	71141	7.2	7.1	7.5	7.9	8.4	9.1	1.7%	-0.9%	5.6%	5.3%	6.7%	15.1%
Independent Artists, Writers, etc.	71151	15.7	16.0	17.2	17.4	18.2	18.6	-7.4%	1.7%	7.9%	1.1%	4.7%	6.8%
Museums	71211	9.0	9.1	9.6	10.0	10.5	11.0	-0.7%	1.4%	4.5%	5.1%	4.1%	9.0%
Musical Instrument Manufacturing	339992	2.9	2.8	2.8	3.0	3.0	3.0	-12.8%	-4.5%	2.6%	5.4%	-0.4%	-0.6%
Fine and Performing Arts Schools		**8.8**	**9.1**	**9.6**	**9.9**	**10.4**	**11.2**	**-0.7%**	**2.5%**	**6.0%**	**3.4%**	**4.8%**	**12.4%**
Fine and Performing Arts Schools	61161	8.8	9.1	9.6	9.9	10.4	11.2	-0.7%	2.5%	6.0%	3.4%	4.8%	12.4%
TOTAL		**679.5**	**652.0**	**660.1**	**673.3**	**694.9**	**722.6**	**-9.8%**	**-4.0%**	**1.2%**	**2.0%**	**3.2%**	**7.3%**

Source: California EDD, LMID, QCEW Series

TABLE 50:
CALIFORNIA EMPLOYMENT BY CREATIVE OCCUPATION

Occupational Title	SOC Code	Average Employment		2009-2014 Changes		Median Annual Wage 2014	Location Quotient	Entry Level Education
		2009	2014	Number	Percent			
Management Occupations:		**44,120**	**43,230**	**-890**	**-2.0%**			
Advertising and Promotions Managers	11-2011	4,770	4,130	-640	-13.4%	$101,220	1.26	Bachelor's Degree
Marketing Managers	11-2021	32,910	32,520	-390	-1.2%	$149,560	1.58	Bachelor's Degree
Public Relations and Fundraising Managers	11-2031	6,440	6,580	140	2.2%	$107,300	1.03	Bachelor's Degree
Business and Financial Operations Occupations:		**3,390**	**4,320**	**930**	**27.4%**			
Agents and Business Managers of Artists, etc.	13-1011	3,390	4,320	930	27.4%	$84,530	3.25	Bachelor's Degree
Architecture and Engineering Occupations:		**30,380**	**25,470**	**-4,910**	**-16.2%**			
Architects, Except Landscape and Naval	17-1011	11,260	10,250	-1,010	-9.0%	$85,030	1.03	Bachelor's Degree
Landscape Architects	17-1012	3,160	2,860	-300	-9.5%	$79,020	1.41	Bachelor's Degree
Architectural and Civil Drafters	17-3011	15,960	12,360	-3,600	-22.6%	$57,230	1.21	Associate Degree
Education, Training and Library Operations:		**54,910**	**54,290**	**-620**	**-1.1%**			
Architecture Teachers, Postsecondary	25-1031	510	**	---	---	*	*	Doctoral/Professional Degree
Anthropology and Archeology Teachers, Postsecondary	25-1061	790	550	-240	-30.4%	$88,440	0.80	Doctoral/Professional Degree
Area, Ethnic and Cultural Studies Teachers, Postsecondary	25-1062	720	740	20	2.8%	$72,640	0.73	Doctoral/Professional Degree
Library Science Teachers, Postsecondary	25-1082	260	260	0	0.0%	$102,410	0.51	Doctoral/Professional Degree
Art, Drama and Music Teachers, Postsecondary	25-1121	11,080	13,830	2,750	24.8%	$78,290	1.27	Doctoral/Professional Degree
Communications Teachers, Postsecondary	25-1122	2,480	3,180	700	28.2%	$86,990	0.96	Doctoral/Professional Degree
English Language and Literature Teachers, Postsecondary	25-1123	8,320	7,630	-690	-8.3%	$77,450	0.89	Doctoral/Professional Degree
Foreign Language and Literature Teachers, Postsecondary	25-1124	3,780	3,370	-410	-10.8%	$76,230	0.97	Doctoral/Professional Degree
History Teachers, Postsecondary	25-1125	1,910	1,740	-170	-8.9%	$85,150	0.66	Doctoral/Professional Degree
Archivists	25-4011	300	430	130	43.3%	$49,730	0.72	---
Curators	25-4012	1,070	950	-120	-11.2%	$62,040	0.76	Masters Degree
Museum Technicians and Conservators	25-4013	1,140	1,140	0	0.0%	$42,360	1.02	Bachelor's Degree
Librarians	25-4021	10,280	8,950	-1,330	-12.9%	$70,860	0.60	Masters Degree
Library Technicians	25-4031	11,640	10,390	-1,250	-10.7%	$41,930	0.98	Post Secondary/Non-degree Award
Audio-Visual and Multimedia Collections Specialists	25-9011	630	1,130	500	79.4%	$43,340	1.13	Bachelor's Degree
Art, Design, Entertainment and Media Occupations:		**216,040**	**249,100**	**33,060**	**15.3%**			
Art Directors	27-1011	6,390	5,940	-450	-7.0%	$105,900	1.60	Bachelor's Degree
Craft Artists	27-1012	540	480	-60	-11.1%	$49,380	0.90	HS Diploma or Equivalent
Fine Artists, Including Painters, Sculptors and Illustrators	27-1013	1,480	3,190	1,710	115.5%	$58,810	2.36	HS Diploma or Equivalent
Multimedia Artists and Animators	27-1014	9,440	9,560	120	1.3%	$79,790	2.95	Bachelor's Degree
Artists and Related Workers, All Other	27-1019	1,070	**	---	---	$55,940	*	HS Diploma or Equivalent
Commercial and Industrial Designers	27-1021	2,820	3,950	1,130	40.1%	$67,600	1.20	Bachelor's Degree
Fashion Designers	27-1022	4,050	5,750	1,700	42.0%	$66,320	2.88	HS Diploma or Equivalent
Floral Designers	27-1023	3,510	3,260	-250	-7.1%	$29,220	0.65	HS Diploma or Equivalent
Graphic Designers	27-1024	27,990	27,180	-810	-2.9%	$53,710	1.23	Bachelor's Degree
Interior Designers	27-1025	5,700	5,860	160	2.8%	$55,010	1.16	Bachelor's Degree
Merchandise Displayers and Window Trimmers	27-1026	9,730	8,850	-880	-9.0%	$28,010	0.85	HS Diploma or Equivalent
Set and Exhibit Designers	27-1027	1,660	2,300	640	38.6%	$53,390	1.97	Bachelor's Degree
Designers, All Other	27-1029	2,060	1,370	-690	-33.5%	$56,030	1.78	Bachelor's Degree
Actors	27-2011	**	21,360	---	---	*	3.22	---
Producers and Directors	27-2012	20,070	24,400	4,330	21.6%	$93,380	2.24	Bachelor's Degree
Dancers	27-2031	2,060	1,920	-140	-6.8%	*	1.53	HS Diploma or Equivalent
Choreographers	27-2032	2,800	760	-2,040	-72.9%	$79,920	1.13	HS Diploma or Equivalent
Music Directors and Composers	27-2041	1,820	2,650	830	45.6%	$53,220	1.08	Bachelor's Degree
Musicians and Singers	27-2042	8,890	6,070	-2,820	-31.7%	*	1.39	HS Diploma or Equivalent
Radio and Television Announcers	27-3011	2,880	2,890	10	0.3%	$34,720	0.85	Bachelor's Degree
Public Address System and other Announcers	27-3012	840	1,150	310	36.9%	$25,230	1.38	HS Diploma or Equivalent
Broadcast News Analysts	27-3021	540	510	-30	-5.6%	$59,890	1.06	---
Reporters and Correspondents	27-3022	4,500	4,310	-190	-4.2%	$41,150	0.91	Associate Degree
Public Relations Specialists	27-3031	28,240	21,440	-6,800	-24.1%	$64,710	0.92	Bachelor's Degree
Editors	27-3041	11,490	10,030	-1,460	-12.7%	$60,420	0.92	Bachelor's Degree
Technical Writers	27-3042	6,830	7,130	300	4.4%	$81,860	1.32	Bachelor's Degree
Writers and Authors	27-3043	6,370	7,370	1,000	15.7%	$73,370	1.51	Bachelor's Degree
Media and Communication Workers, All Other	27-3099	6,620	11,350	4,730	71.5%	$46,530	3.97	HS Diploma or Equivalent
Audio and Video Equipment Technicians	27-4011	8,670	12,230	3,560	41.1%	$46,090	1.82	Post Secondary/Non-degree Award
Broadcast Technicians	27-4012	3,350	3,600	250	7.5%	$45,650	1.21	Associate Degree
Radio Operators	27-4013	**	**	---	---	*	*	---
Sound Engineering Technicians	27-4014	3,770	4,060	290	7.7%	$57,890	2.64	Post Secondary/Non-degree Award
Photographers	27-4021	4,950	6,600	1,650	33.3%	$40,200	1.13	HS Diploma or Equivalent
Camera Operators, Television, Video, and Motion Picture	27-4031	3,470	4,560	1,090	31.4%	$58,070	2.23	Bachelor's Degree
Film and Video Editors	27-4032	6,160	10,080	3,920	63.6%	$79,250	3.68	Bachelor's Degree
Media and Communication Equipment Workers, All Other	27-4099	5,280	6,940	1,660	31.4%	$69,660	3.51	Bachelor's Degree
Personal Care and Service Occupations:		**3,540**	**3,680**	**140**	**4.0%**			
Motion Picture Projectionists	39-3021	1,530	760	-770	-50.3%	$20,950	1.07	Less than High School
Costume Attendants	39-3092	1,580	1,880	300	19.0%	$53,850	2.68	HS Diploma or Equivalent
Makeup Artists, Theatrical and Performing	39-5091	430	1,040	610	141.9%	$59,890	3.55	---
Sales and Related Occupations:		**14,380**	**18,060**	**3,680**	**25.6%**			
Advertising Sales Agents	41-3011	14,380	18,060	3,680	25.6%	$57,640	1.05	HS Diploma or Equivalent
Office and Administrative Support Occupations:		**13,250**	**9,690**	**-3,560**	**-26.9%**			
Library Assistants, Clerical	43-4121	11,570	8,550	-3,020	-26.1%	$28,240	0.76	HS Diploma or Equivalent
Desktop Publishers	43-9031	1,680	1,140	-540	-32.1%	$45,650	0.76	Associate Degree
Installation, Maintenance and Repair Occupations:		**4,150**	**3,530**	**-620**	**-14.9%**			
Electronic Home Entertainment Equip. Installers and Repairers	49-2097	3,150	2,230	-920	-29.2%	$37,080	0.75	Post Secondary/Non-degree Award
Camera and Photographic Equipment Repairers	49-9061	500	630	130	26.0%	$42,860	1.79	Associate Degree
Musical Instrument Repairers and Tuners	49-9063	290	530	240	82.8%	$30,820	0.62	---
Watch Repairers	49-9064	210	140	-70	-33.3%	$50,570	0.52	---
Production Occupations:		**30,230**	**23,520**	**-6,710**	**-22.2%**			
Bindery Workers	51-5011	4,400	**	---	---	*	*	---
Bookbinders	51-5012	580	**	---	---	*	*	---
Sewers, Hand	51-6051	1,020	1,000	-20	-2.0%	$22,760	1.50	Less than High School
Tailors, Dressmakers, and Custom Sewers	51-6052	3,480	2,580	-900	-25.9%	$30,070	1.14	Less than High School
Fabric and Apparel Patternmakers	51-6092	2,670	1,970	-700	-26.2%	$47,220	3.23	HS Diploma or Equivalent
Cabinetmakers and Bench Carpenters	51-7011	10,820	8,940	-1,880	-17.4%	$32,690	0.91	HS Diploma or Equivalent
Jewelers and Precious Stone and Metal Workers	51-9071	3,160	3,010	-150	-4.7%	$35,770	1.16	HS Diploma or Equivalent
Painting, Coating and Decorating Workers	51-9123	1,450	1,800	350	24.1%	$30,620	0.99	HS Diploma or Equivalent
Photographic Process Workers	51-9151	1,960	3,320	1,360	69.4%	$31,120	1.03	HS Diploma or Equivalent
Etchers and Engravers	51-9194	690	900	210	30.4%	$32,110	0.93	HS Diploma or Equivalent
		414,390	434,890	20,500	4.9%			

Notes:

Computer and mathematical occupations (software developers applications, 15-1132 and systems, 15-1133) totaled 189,110 jobs in 2014, but were left out of this table because there was no comparable data for 2009 due to a change in how these occupations were coded.

*= indicates that a wage or location quotient estimate are not available

**= indicates that an employment estimate is not available

Source: Bureau of Labor Statistics, Occupational Employment Statistics

TABLE 51:
CALIFORNIA K-12 CREATIVE COURSE ENROLLMENT BY GENDER

	Academic Year														
Course Subject Area	**2014-15**			**2013-14**			**2012-13**			**2011-12**			**2010-11**		
	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total
Agriculture and Natural Resources	9,916	4,419	14,335	9,659	4,744	14,403	---	---	---	---	---	---	---	---	---
Art	289,276	282,818	572,094	286,059	281,906	567,965	285,684	281,600	567,284	282,214	280,598	562,812	301,116	301,539	602,655
Arts, Media and Entertainment	70,794	91,302	162,096	68,692	87,987	156,679	63,442	79,984	143,426	59,999	75,917	135,916	48,258	59,607	107,865
Building Trades and Construction	5,859	21,167	27,026	6,395	22,062	28,457	5,681	20,258	25,939	5,596	22,672	28,268	6,144	22,907	29,051
Computer Education	1,302	2,526	3,828	1,589	2,909	4,498	1,445	2,881	4,326	2,034	3,707	5,741	2,387	4,484	6,871
Consumer and Family Studies	---	---	---	---	---	---	3,614	492	4,106	4,734	727	5,461	4,492	785	5,277
Dance	43,677	6,797	50,474	42,802	6,389	49,191	38,245	5,788	44,033	39,948	46,856	86,804	39,939	6,194	46,133
Drama/Theater	76,103	57,000	133,103	76,478	56,206	132,684	67,834	48,371	116,205	71,444	52,629	124,073	75,767	56,907	132,674
Engineering and Architecture	12,439	38,848	51,287	10,831	34,615	45,446	6,639	19,482	26,121	6,800	21,616	28,416	5,610	18,679	24,289
English Language Arts	57,298	50,503	107,801	59,024	52,648	111,672	54,024	48,001	102,025	60,571	54,288	114,859	61,750	54,601	116,351
Fashion and Interior Design	7,404	1,340	8,744	8,428	1,450	9,878	3,771	543	4,314	4,369	825	5,194	3,997	745	4,742
Fine and Performing Arts (IB)*	---	---	---	---	---	---	1,441	912	2,353	1,369	864	2,233	1,559	1,074	2,633
Information and Communication Technologies	5,610	8,904	14,514	4,895	7,186	12,081	2,497	4,679	7,176	2,724	4,482	7,206	2,102	3,495	5,597
Manufacturing and Product Development	2,738	5,513	8,251	2,151	4,812	6,963	1,627	3,801	5,428	1,954	4,661	6,615	1,750	4,052	5,802
Marketing Sales and Service	---	---	---	---	---	---	2,841	803	3,644	3,149	1,014	4,163	2,228	604	2,832
Music	270,119	239,816	509,935	262,426	235,519	497,945	248,640	230,881	479,521	264,782	245,456	510,238	240,859	231,382	472,241
Creative Courses Totals:	**852,535**	**810,953**	**1,663,488**	**839,429**	**798,433**	**1,637,862**	**787,425**	**748,476**	**1,535,901**	**811,687**	**816,312**	**1,627,999**	**797,958**	**767,055**	**1,565,013**
All Courses Totals:	**11,091,159**	**11,666,276**	**22,757,435**	**11,009,838**	**11,539,705**	**22,549,543**	**10,800,648**	**11,381,715**	**22,182,363**	**10,324,273**	**10,836,807**	**21,161,080**	**11,204,716**	**11,702,407**	**22,907,123**

*** IB:** International Baccalaureate 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.
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.

TABLE 52:
CALIFORNIA K-12 CREATIVE CLASSES MEETING UC/CSU REQUIREMENTS

	Academic Year									
Course Subject Area	**2014-15**		**2013-14**		**2012-13**		**2011-12**		**2010-11**	
	#Classes	#Classes Meeting UC/CSU Req'ts	#Classes	#Classes Meeting UC/CSU Req'ts	#Classes	#Classes Meeting UC/CSU Req'ts	#Classes	#Classes Meeting UC/CSU Req'ts	#Classes	#Classes Meeting UC/CSU Req'ts
Agriculture and Natural Resources	651	261	703	240	---	---	---	---	---	---
Art	28,466	17,722	28,352	17,499	23,924	14,612	25,304	14,065	24,234	14,305
Arts, Media and Entertainment	7,068	3,828	6,680	3,360	5,524	2,786	5,417	2,414	4,094	2,242
Building Trades and Construction	1,254	11	1,280	9	1,092	13	1,228	22	1,230	16
Computer Education	198	13	244	15	208	9	285	34	336	37
Consumer and Family Studies	---	---	---	---	173	6	233	22	225	6
Dance	2,038	1,175	1,988	1,081	1,584	861	1,685	895	1,608	951
Drama/Theater	5,816	3,336	5,507	3,169	4,412	2,492	4,816	2,620	4,880	2,784
Engineering and Architecture	2,171	1,008	1,949	796	1,080	339	1,196	332	993	219
English Language Arts	5,964	3,883	5,896	3,612	4,707	2,773	5,003	2,627	5,113	2,870
Fashion and Interior Design	731	60	757	61	255	32	344	27	273	18
Fine and Performing Arts (IB)*	---	---	---	---	136	125	152	125	163	134
Information and Communication Technology	665	226	549	150	265	87	266	80	207	68
Manufacturing and Product Development	400	76	347	60	227	110	281	129	258	135
Marketing Sales and Service	---	---	---	---	168	63	180	62	130	42
Music	18,586	6,789	17,641	6,423	15,460	5,977	17,877	6,390	15,354	5,989
Creative Courses Totals:	**74,008**	**38,388**	**71,893**	**36,475**	**59,215**	**30,285**	**64,267**	**29,844**	**59,098**	**29,816**
All Courses Totals:	**1,056,050**	**332,392**	**1,028,919**	**324,509**	**916,230**	**298,064**	**881,252**	**282,779**	**912,895**	**275,467**

*** IB:** International Baccalaureate 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.
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.

TABLE 53:
K-12 CREATIVE COURSES BY SUBJECT AREA

Agriculture and Natural Resources	Photographic laboratory and darkroom	**Information Technology**
Floriculture & floral design	Photography production and technology	3D Media Design 1
Introduction to ornamental horticulture	Radio production	Computer graphics and media technology
Landscape design	Stage design and production	Computer programming and game design
	Stage production	Game design and development
Art	Television production	Graphic communications
Advertising design	Three-dimensional design	Multimedia and animation
AP Art History	Two-dimensional design	
AP Studio art: drawing	Visual art and related careers	**Manufacturing and Product Development**
AP Studio art: three dimensional		Advanced/specialized graphic production
Art appreciation (elem sch std)	**Building and Construction Trades**	Advanced/specialized product design
Art appreciation (sec sch std)	Cabinet making	Drafting/computer aided design
Art history	Furniture making	Exploring manufacturing and design
Ceramics (Beginning and Advanced)	Introduction to woodworking principles	Graphic production technologies
Cinematography/Artistic Videos (Begin or Adv)	Millwork and cabinet manufacturing	Jewelry design, fabrication and repair
Crafts		Principles of manufacturing and design
Design	**Computer Education**	Product development
Digital Art/Computer Art/Artistic Graphics	MYP IB Design Technology	Silk screen making and printing
Drawing	Web design	
Fashion design		**Music**
Fibers and textiles	**Dance**	AP Music theory
Fundamentals of Art (elem sch std)	Advanced dance study (independent or studio)	Band
Fundamentals of Art (sec sch std)	Ballet, modern, jazz, world dance	Chorus/choir/vocal ensemble
IB Visual arts	Dance choreography and production	Composition/songwriting
Jewelry	Dance, movement & rhythmic fund. (elem sch std)	Computers and electronics/digital music
Lettering/calligraphy	Dance, movement, & rhythmic fund. (sec sch std)	Gen/classroom/exploratory music
Multicultural art/folk art	Folk/traditional dance	Gen/classroom/introduction to music
MYP Visual arts	Other dance course	IB Music
Other art course		Instrumental ensemble
Painting	**Drama/Theater**	Instrumental music lessons (elem sch std)
Photography (beginning or advanced)	Advanced theater	Instrumental music lessons (sec sch std)
Printmaking	History/appreciation of theater arts	Music appreciation/history/literature
Sculpture	IB Theater	Music theory
	Media/film/video/television production	Musical theater
Arts, Media, and Entertainment	MYP Drama	MYP Music
Advanced cinema/film/video product	Other drama/theater courses	Orchestra/symphony
Advanced dance/choreography	Technical theater/stagecraft	Other music course
Advanced game design	Theatre/creative dramatics (elem sch std)	Voice class
Advanced graphic communications	Theatre /play production (sec sch std)	
Advanced professional music		
Advanced theater performance	**Engineering and Architecture**	
Arts management	Architectural and structural engineering	
Broadcast production	Engineering design level 2	
Broadcasting technology	Engineering technology level 2	
Commercial art	Environmental engineering level 2	
Commercial photography	Principles of design	
Film making	Principles of engineering design	
Film/cinema/video production	Principles of engineering technology	
Game design	Principles of environmental engineering	
Intermediate animation	Technical drafting	
Intermediate dance performance		
Intermediate game design	**English language arts**	
Intermediate graphic technology	Advanced composition	
Intermediate musical performance	Composition	
Intermediate state technology	Journalism	
Intermediate theater performance		
Internet publishing	**Fashion and Interior Design**	
Intro to animation	Apparel design and construction	
Intro to multimedia production	Apparel manufacturing, production and maint.	
Intro to professional dance	Cosmetology	
Intro to professional music	Environmental design	
Intro to professional theater	Fashion merchandising	
Introduction to graphic arts	Fashion, textiles and apparel	
Introduction to media arts	Housing and furnishings	
Introduction to stage technology	Interior design, furnishings	
Other arts, media and entertainment		

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