Creative Economy

IN THE SAN DIEGO REGION

SAN DIEGO REGIONAL POLICY & INNOVATION CENTER

The City of SAN DIEGO

Executive Summary

In 2022, the creative industries created almost 170,000 jobs and had a total economic impact of $10.8 billion dollars, as measured by the combined industries' Gross Regional Product (GRP). It created 82,467 direct creative economy jobs, and almost 87,000 indirect jobs. Although GRP for creative industries fell as the COVID-19 pandemic hit in 2020, it rebounded after 2021. This is a trend we also see for employment numbers and other metrics, although gains and losses were not the same across industries. As we can see from the report, the Digital Media sector grew its earnings substantially, while the Printing and Publishing sector suffered through job losses. The number of creative firms in the region has not bounced back after the pandemic, with 6,179 firms in 2022 compared to 7,386 firms in the 2019 report.

All occupation groups have grown over the past 5 years, and are expected to continue growing, except for Production occupations, which shrunk 4% over the past 5 years. For the many creatives that don't work for an employer and are instead self-employed, the top occupation is Writers and Authors, with 1,236 workers, and a median hourly wage of $23.57. The fastest-growing occupation group has been Business & Financial Operations, followed by managers, with jobs like agents and business managers of artists, marketing managers, and public relations managers. It is no surprise that business administration and management is the leading major in the pipeline to a creative occupation, followed by liberal arts and sciences.

When it comes to diversity in the workforce, 58% of workers in creative industries are White, and 55% are men, compared to a county population of 43% White and 50% men. While they are underrepresented, over the past 10 years, the percentage of creative workers who are Black, Hispanic, and Asian has been increasing substantially. Still, survey respondents echoed larger equity issues in their Creative Economy concerns, including lack of diversity within workers, especially between leadership and employee positions, and lack of resources and investment going towards under-resourced communities and workers of color.

Through a survey of workers and employers in the Creative Economy, we learned that employers are least satisfied with government regulations and most satisfied with San Diego's skilled workforce; 37% of employers were unsatisfied and 35% were satisfied, respectively. Of worker respondents, 60% found San Diego lacking for being able to find creative work, and 59% were dissatisfied with the amount of money they earned. Over 80% of workers were satisfied with their jobs and most were unlikely to leave their profession.

For many businesses, one of their main concerns was having to adhere to HR regulations for larger firms than they previously were because of California Assembly Bill 5 (AB5), which required them to reclassify their contractors as employees, and brought on expensive administrative burdens. This makes intuitive sense given that 85% of creative businesses in the region are small, and 21% of employer survey respondents mentioned their organizations did not employ any full-time workers. Other concerns included cost of living, funding, and lack of creative spaces.

Workers' top concerns were the cost of living and working, followed by a lack of jobs, burdensome business development responsibilities, their contributions not being recognized, and working in silos. Almost 70% of our respondents had an employment type different from one full-time job, most commonly a mix of non-full-time jobs, which ties into the lack of stable creative job opportunities. Although a lack of community was a top concern, over half of creative workers were not part of a creative association.

There is a need for strategic integration by collectively incorporating the Creative Economy into regional growth strategies, such as expanding job opportunities and supporting small businesses. We must leverage existing strengths in the creative industries and innovation economy through partnerships, business development training, and addressing the lack of community and networking opportunities.

Because of the high costs of living as doing business in San Diego, creatives would benefit from tailored support programs for creative workers and business owners. These should encompass financial, business, and creative aspects, including investor programs, grants, and networking opportunities. Business incentives, such as relocation incentives and tailored support programs, could help attract and retain creative businesses who are struggling to manage high costs. Building physical infrastructure, including affordable spaces for work and showcasing, is essential to decrease costs in the long run, and public-private partnerships and the repurposing of buildings could be explored.

Diversifying San Diego's talent requires creating visible career pathways through education, internships, and apprenticeships, as well as developing leadership and hiring initiatives to address racial disparities. Lastly, increasing the visibility of San Diego's creative industries locally and globally can be achieved through cross-industry programs, marketing campaigns, and showcasing local creative production and trade.

To foster a thriving creative economy, it is crucial to address the affordability and accessibility of physical infrastructure, provide incentives to grow creative businesses to create sufficient stable work opportunities, review existing regulations that increase costs for business owners, and enhance funding opportunities from both government and corporate sectors. Additionally, there is a need for greater collaboration among creatives to break down silos and foster a sense of community within the industries.

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Credits

The City of San Diego gratefully acknowledges the significant contributions provided by the San Diego Regional Policy & Innovation Center and shares special thanks with respondents who completed surveys that also contributed to the report.

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CALIFORNIA ARTS COUNCIL
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AUTHORS: Gabriela Gonzalez, Karen Boyd, Alicia Jurek, Daniel Enemark.

KEY CONTRIBUTORS: Jonathan Glus and Christine E. Jones, City of San Diego, Commission for Arts and Culture.

Introduction

Background

Creative industries are crucial to San Diego's cultural and economic wellbeing. In 2020, the San Diego Regional Economic Development Corporation (EDC), published a study commissioned by City of San Diego (City) Commission for Arts and Culture and Economic Development Department of the Creative Economy to gain insight into the impact of creative industries and occupations in the region. Written using 2019 data, the study found that creative industries accounted for over $11 billion in regional economic impact, and creative occupations employed over 70,000 workers. This report was intended to help the City understand who makes up the creative economy and what are the challenges and trends in these industries in order to invest in San Diego's creative economy. [1, 2]

Since that report was published, COVID-19 has had a devastating effect on the creative economy. This 2023 Creative Economy report was commissioned by the City to guide investment and policies to better advance recovery from COVID-19 and strengthen the local creative economy. In the following report, the research team at the San Diego Regional Policy and Innovation Center (PIC) analyzed labor market data and put together a survey for both employers and workers to talk about their experiences and challenges.

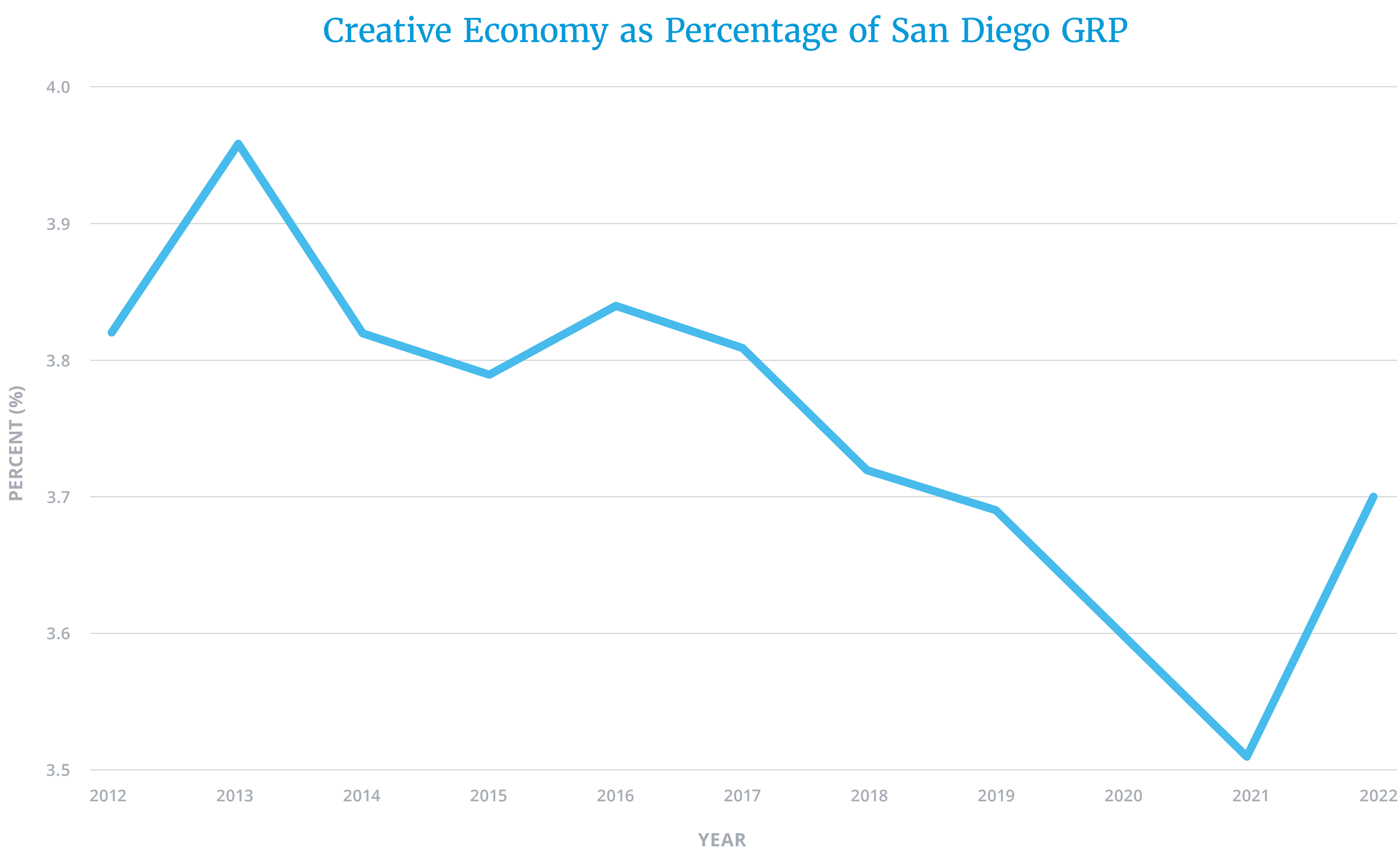
This report reviews the landscape of the creative economy, its workers, and firms using labor market data and survey data to understand the experiences of workers and employers. The survey aims to describe employers' talent needs, how they see growth in their companies, and their perceptions of San Diego as a place for them to do business. For employees, it aims to understand job satisfaction, job quality, and perceptions of San Diego as a place to do creative work.

Our Creative Economy labor market and survey analysis will help identify specific needs and opportunities for improvements, creative workforce pathways, and employment and occupation trends for future programming and resource development.

1 San Diego's Creative Economy. (2020). San Diego Regional EDC. https://sd-regional-edc.maps.arcgis.com/apps/Cascade/index.html?appid=7c7a91fcc7984f1db243cbdc5b8d7b1f

2 Latchford, J. (2020). EDC, City of SD release study on creative economy. San Diego Regional EDC. https://www.sandiegobusiness.org/blog/edc-city-of-sd-release-study-on-creative-economy/

Figure 1: Creative Economy's Contribution to San Diego GRP from 2012 to 2022



San Diego Comparison

In this section, we can see how creative economy fits into and contributes to the larger regional economy. In Table 1, we see that jobs in creative industries made up 3.9% of San Diego jobs in 2012 and 3.8% in 2022. While approximately tracking the growth in jobs in San Diego's larger economy, San Diego enjoyed 16.4% job growth over those 10 years, while the Creative Economy saw slower job growth, at 14.4%.

For comparison, we added Creative Economy job growth in peer cities Riverside, Los Angeles, and San Francisco. The change in total job counts was biggest in Los Angeles, which added over 10k jobs to their Creative Industries, although Riverside grew the most in percentage of jobs, with an increase of 26% over the past 10 years.

Gross Regional Product (GRP) is the market value of all goods and services produced in a region—in our case, in San Diego County. It's calculated by adding up all earnings, taxes on production, taxes on imports, and profits, and subtracting any subsidies.[3]

Table 2 breaks down the contribution of each creative industry subsector to the larger regional economy. San Diego's GRP increased by 23.5% between 2018 and 2022. The creative economy contributes 3.7% of San Diego's total GRP. Figure 1 illustrates how that contribution has fluctuated over the last 10 years. The Digital Media sector of the creative economy made the largest contribution to this total. The Creative Economy as a proportion of San Diego's regional economy has been steadily shrinking over the past 10 years, hitting its lowest point in 2021 at 3.51% of GRP before bouncing back to 2019 levels in 2022.

Comparing creative industries' GRP among peer cities, we can see that although San Francisco has around the same number of job counts in 2022, their GRP is over three times the San Diego 2022 creative industry GRP. This could be due to greater earnings in San Francisco's creative industries, but more in-depth analysis would be necessary to understand the cause.

To better illustrate the diversity in the creative economy, observe changes in different areas, and improve comparability to previous reports, we have split the creative economy into subsectors. To see which industries we included in our definition of the creative economy and how we classified them into subsectors, see Appendix A.

3 Gross Regional Product (GRP). (n.d.). Emsi Knowledge Base. https://kb.emsidata.com/glossary/gross-regional-product-or-grp-i0/

Table 1: Employment in the creative economy compared to San Diego overall

	2012 Jobs	2022 Jobs	Change 2012-2022
San Diego	1,846,180	2,148,392	302,212
SD Creative Economy	72,078	82,467	10,389 (14%)
LA Creative Economy	577,442	628,467	51,025 (9%)
San Francisco Creative Economy	68,312	84,322	16,010 (23%)
Riverside Creative Economy	23,202	29,208	6,006 (26%)

Table 2: Contribution of the Creative Economy to San Diego's Gross Regional Product (in millions of dollars)

	2018	2019	2020	2021	2022
San Diego GRP	235,200.16	245,356.36	246,060.98	271,017.11	290,572.73
Architecture and Interior Design	562.03	602.02	530.75	599.5	643.42
Art Dealers	30.02	28.52	27.15	30.55	32.46
Communication Arts	656.15	668.95	580.92	698.14	841.77
Digital Media	2,232.49	2,485.23	2,717.48	2,714.15	3,111.74
Entertainment	1,692.7	1,582.68	1,528.13	1,540.66	1,611.73
Events	1,123.5	1,083.54	1,098.36	1,246.12	1,385.48
Fashion	148.45	152.2	154.27	181.18	201.97
Fine Arts Schools	27.59	43.65	33.76	35.29	40.39
Industrial Design Services	41.21	45.06	34.04	39.88	43.9
Museums	354.58	367.76	239.77	306.44	402.64
Music	118.75	113.89	84.75	108.72	122.56
Publishing and Printing	1,216.27	1,297.05	1,359.03	1,341.86	1,547.97
Visual and Performing Arts	555.77	582.03	473.48	659.35	764.04
Creative Economy	8,759.5	9,052.58	8,861.9	9,501.83	10,750.07
Percentage	3.72	3.69	3.6	3.51	3.7
LA Creative Economy	104,602.67	$106,011.59	$96,547.55	$112,555.23	$121,436.06
San Francisco Creative Economy	$22,440.09	$28,806.98	$30,201.50	$32,032.45	$32,740.00
Riverside Creative Economy	$1,600.12	$1,633.43	$1,379.80	$1,745.90	$1,923.94

Measurements and Methodology

This report has been put together in collaboration with the City, guided by the questions they wanted to answer about the post-pandemic creative economy. The goal of this project, starting with EDC's 2020 Creative Economy Study, was to understand trends in creative industries and occupations to help target growth and investment. This report has focused on replicating some of the labor market analysis and survey insights to see whether and how key features of the creative economy have changed. This includes grouping creative industries into the same 13 industry groups and creative occupations into the same 8 occupation groups. For more information about those groups, see Appendix A.

Some differences in our reports include updated occupation titles to reflect updated 2021 Standard Occupation Classification (SOC) codes,[4] survey questions about creative workers, and the inclusion of "extended proprietors" in our analysis.[5] Many of our survey responses came from self-employed individuals who were struggling to make a creative occupation their primary job and therefore worked other jobs to support themselves, which are included in extended proprietors. We believe capturing survey and labor market data on workers and self-employed individuals will help build on previous insights and help the City and region better understand San Diego's creative industries.

Our main method of distribution for the survey was by email and social media outreach. We partnered with the City for support promoting our survey to their creative partners. Our target audiences included creative associations, creative departments in colleges and universities, and creative industry employers.

A total of 340 people filled out our survey, and of those 195 responded as employees and self-employed, while 64 responded as employers. These categories are not mutually exclusive. Employers, defined as those in a position to hire creative workers, could also identify as employees or self-employed, defined as those working in a creative occupation. Respondents who selected, for example, both "employee" and "employer" were asked one set of questions to respond to about each role. Not all respondents fully completed the survey, but we analyzed each question based on all qualifying answers received. Respondents qualified if they hired creative workers, were creative workers, were creative self-employed individuals, worked for a company in a creative industry, and lived or worked in the County of San Diego.

For our labor market analysis, we used Lightcast's current and historical data from 2012 to 2022 and forecasts up to 2027. Lightcast builds proprietary datasets with data from various sources, including the Bureau of Economic Analysis (BEA), the U.S. Census, the American Community Survey (ACS), the National Center for Education Statistics (NCES), and the Bureau of Labor Statistics (BLS).[6]

4 The Bureau of Labor Statistics uses Standard Occupation Classification Codes to describe and classify Occupational Employment and Wage Statistics. These codes are periodically updated to ensure they reflect the reality of jobs in a changing economy. The EDC report used a previous version of SOC codes; this report uses 2021 SOC codes.

5 This class covers the same job types as the "Self-Employed" class of worker, but Extended Proprietor jobs represent miscellaneous labor income for persons who do not consider it a primary job. Extended Proprietor jobs include minor or underreported self-employment, investments trusts and partnerships, certain farms, and tax-exempt nonprofit cooperatives. We included Extended Proprietor data because our survey data and literature review indicated that these workers constitute a substantial portion of San Diego's creative economy. Source: https://kb.emsidata.com/glossary/extended-proprietors-data-category/

6 Welcome to the Emsi Knowledge Base. (n.d.). Emsi Knowledge Base. https://kb.emsidata.com/

The Creative Economy by Industry

At a Glance

The goal of this report is to present economic and survey data to better understand the firms and individuals who produce "cultural, artistic and design goods or services, and intellectual property"[7] in San Diego County. This section reviews labor market information about San Diego's creative industries to get a picture of how they have changed over time.

The Creative Economy's total economic impact is estimated at $10.75 billion, broken down by industry in Figure 2. We measure this using Gross Regional Product[8] as the metric, which measures the creative industries' direct impact on the economy.

It also created 169,457 total jobs. Table 3 shows the number of direct, indirect, and induced jobs related to the creative economy. Direct jobs are held by people directly participating in a creative industry, as listed in Appendix A. Indirect jobs are jobs created by demand generated by work in the creative economy. For example, economic activity in printing and publishing creates demand for paper, ink, and other materials but doesn't make up the entire demand for any of those things. To estimate indirect jobs, the creative economy gets "credit" for a portion of the jobs in the supply chain proportionate to the amount of demand it generates. Induced jobs are those created by the spending of workers in the creative economy supply chain.

Figure 4 shows the Gross Regional Product of each creative economy subsector in 2012 and 2022. This allows us to see how each sector's contribution has changed over the last 10 years. In 2012, Digital Media was already the leading sector in terms of GRP contribution, and it also experienced substantial growth over that period. Other sectors that experienced proportionately large growth in GRP contribution over that period include Events, Communication Arts, and Fashion. As we will see over the course of this section, this GRP contribution is not reflected in the number of Digital Media jobs but is likely driven by the relatively high pay in this sector.

Table 3: Direct, Indirect, and Induced Jobs in the Creative Economy

	Direct	Indirect and Induced	Total
Jobs	82,467	86,990	169,457

7 San Diego Regional Economic Development Corporation. (2020). San Diego's Creative Economy. https://sd-regional-edc.maps.arcgis.com/apps/Cascade/index.html?appid=7c7a91fcc7984f1db243cbdc5b8d7b1f

8 Gross Regional Product (GRP). (n.d.) Emsi Knowledge Base. https://kb.emsidata.com/glossary/gross-regional-product-or-grp-i0/

Figure 2: Total Economic Impact as Measured by Total Value Added

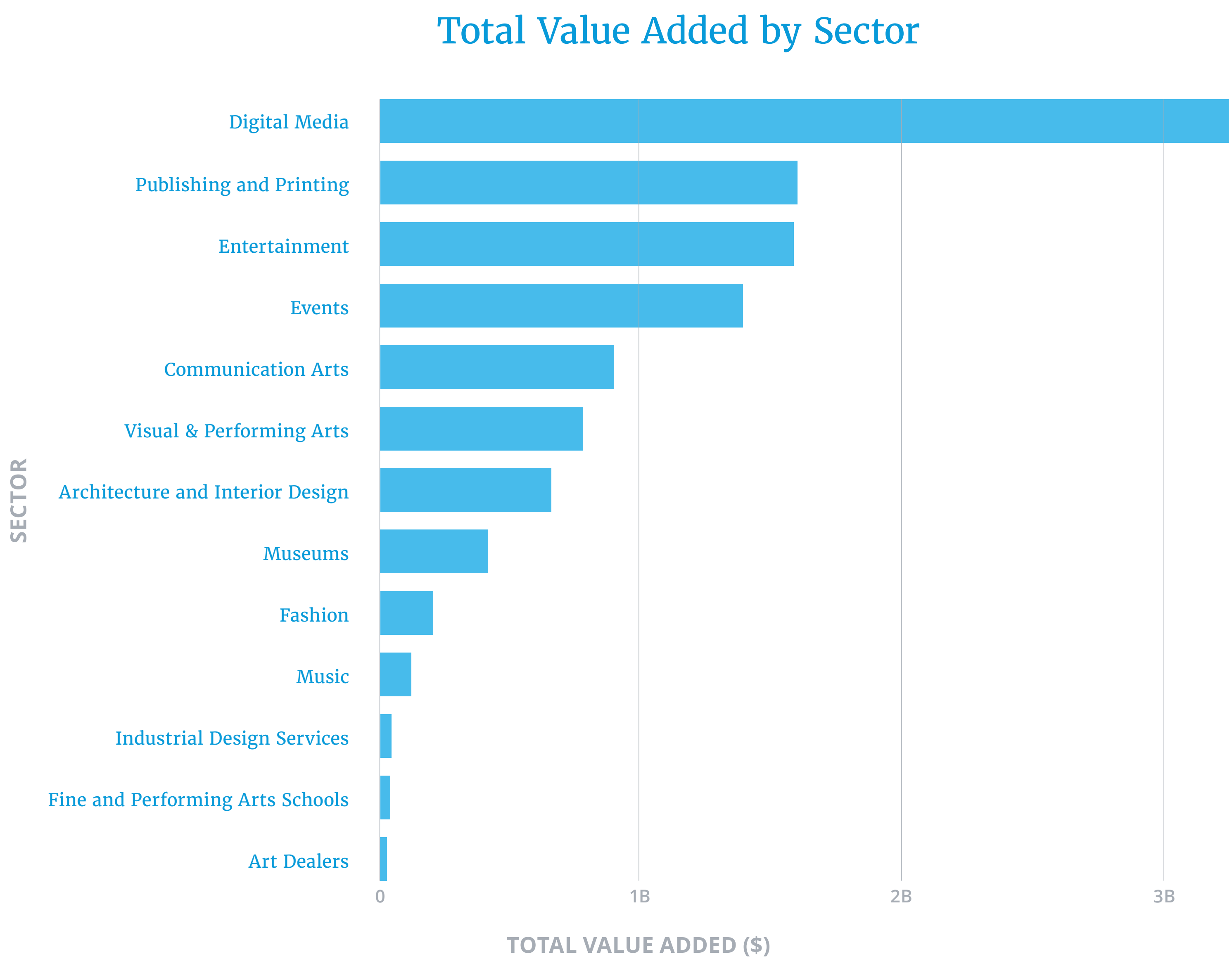


Figure 3: Creative Industries: Total Job Impact

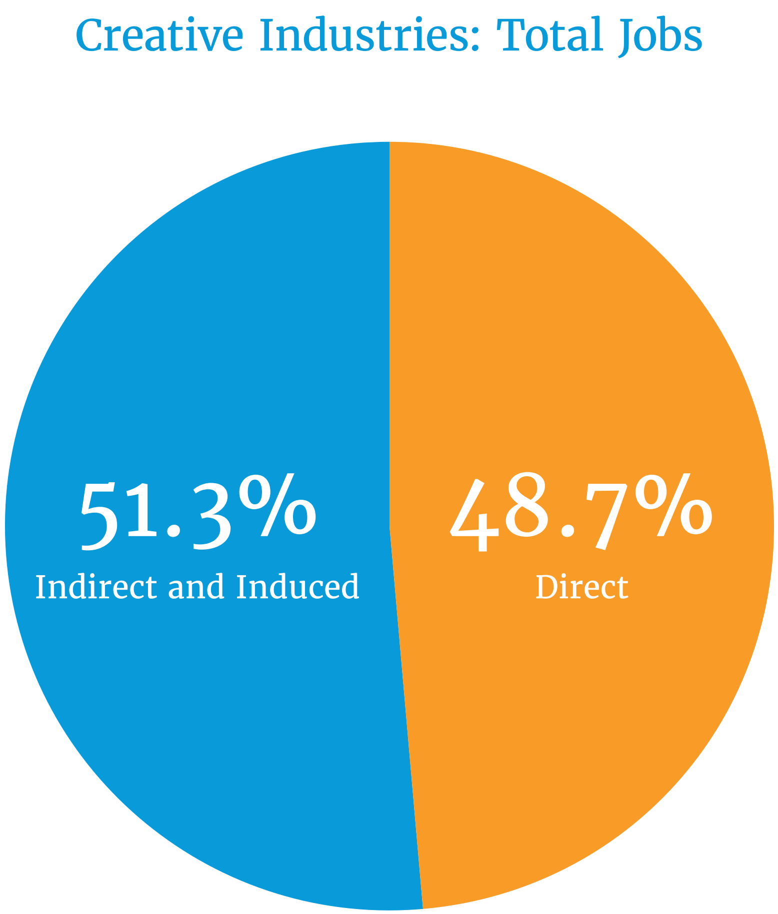


Figure 4: GRP by Sector in 2012 and 2022

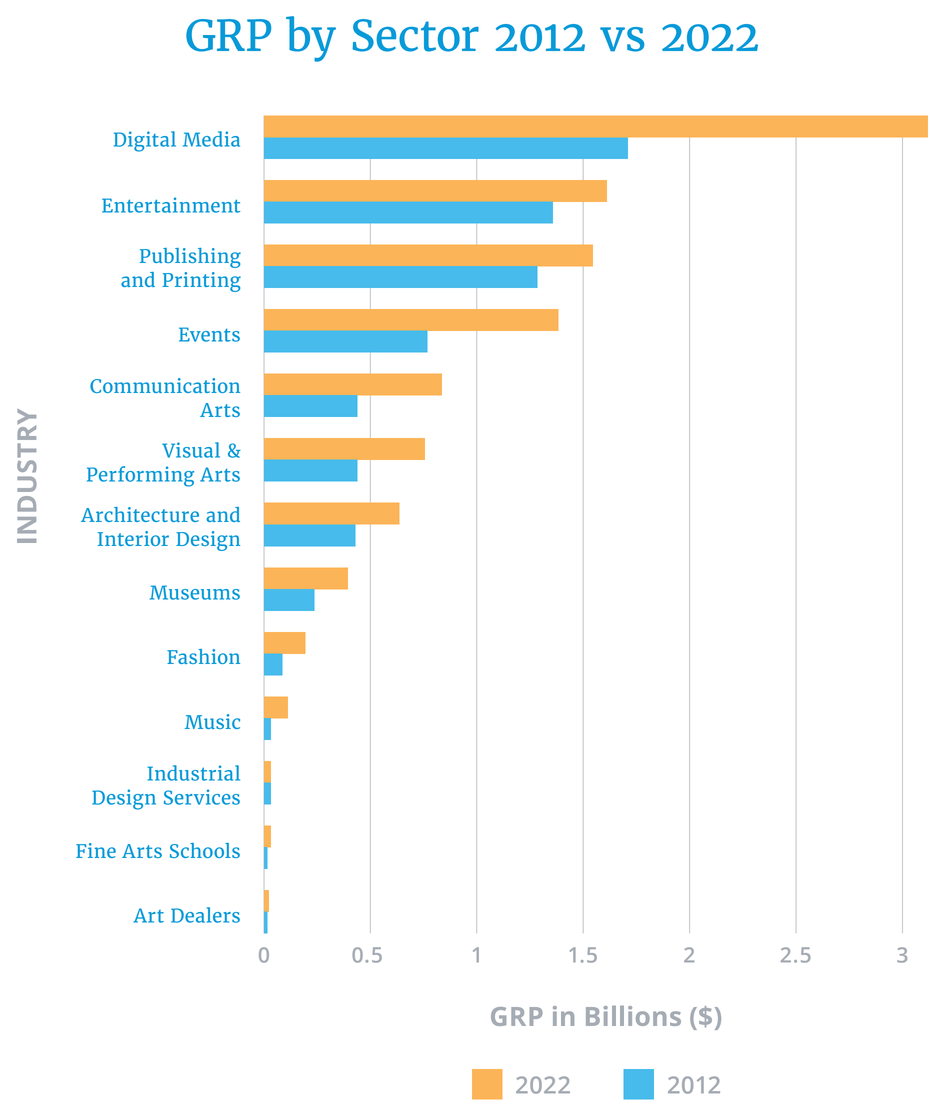
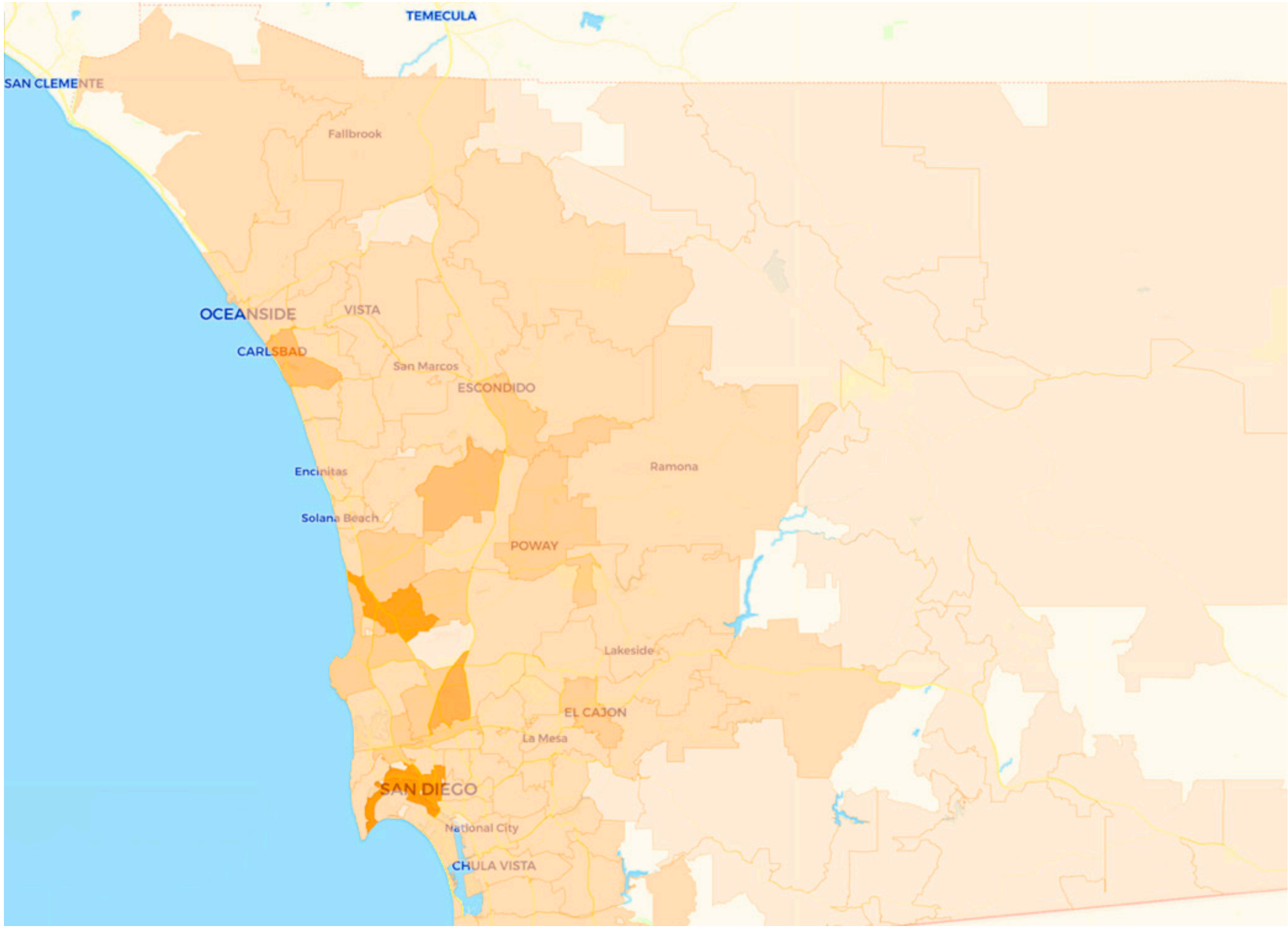


Figure 5: Map showing the number of creative jobs by zip code 2022



Number of Creative Jobs by Zip Code

<100	1,001-2,000	3,001-4,000
100-1,000	2,001-3,000	>4,000

Growth by Sector

Table 4 shows how employment in the creative economy is distributed across its component industries. Employment in most of the industry's subsectors has remained mostly flat over the last ten years, with a noticeable dip in 2020 and subsequent recovery. Subsectors that stand out include Visual and Performing Arts, which has consistently led employment in the creative economy over the last 10 years. Publishing and Printing has seen a slow and mostly consistent decline over the last ten years, while Events had the opposite trajectory, surpassing Publishing and Printing between 2016 and 2017 and taking the second spot for regional employment.

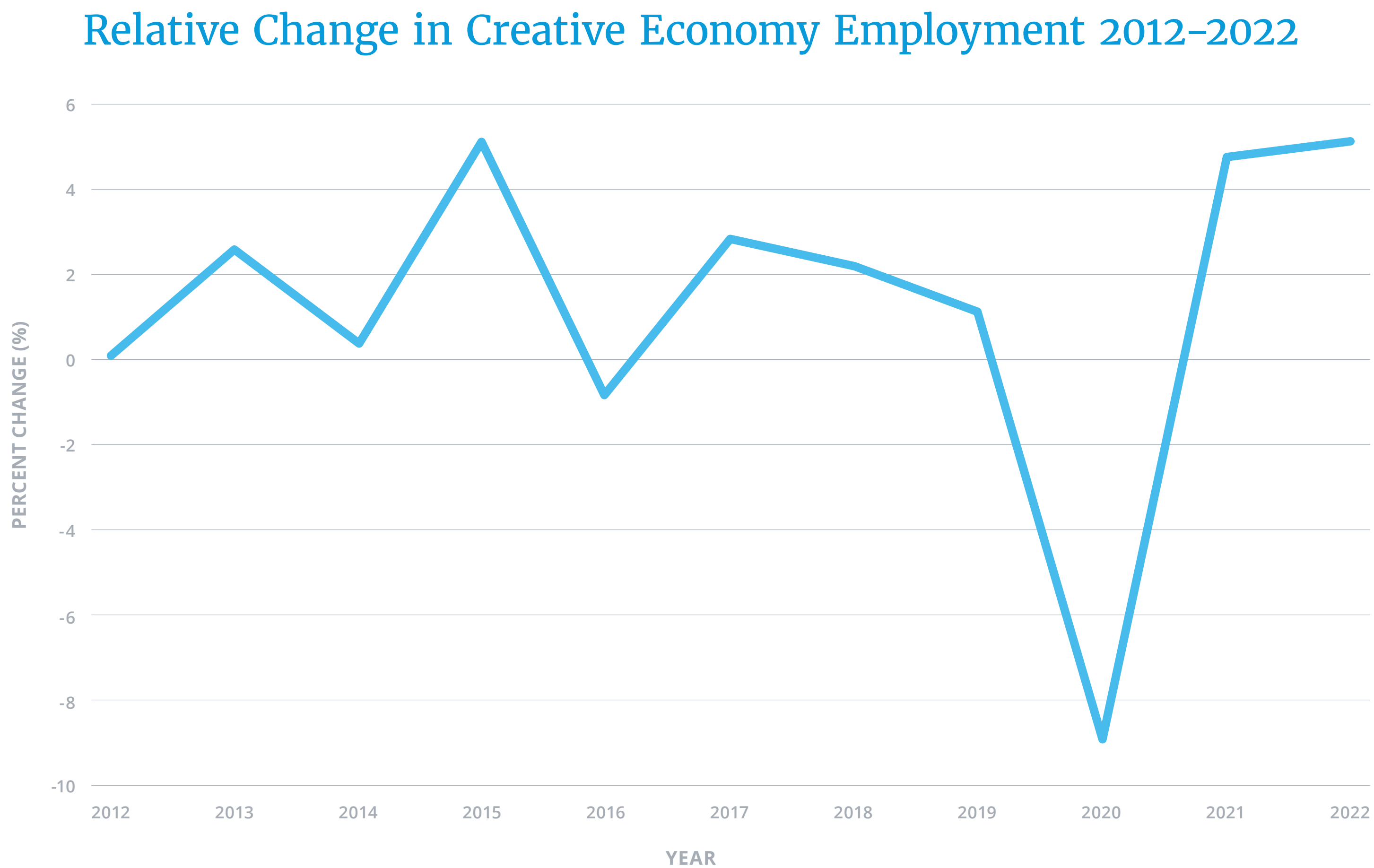
Table 4: Employment in the Creative Economy by Sector (2012-2022)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Publishing and Printing	11,592	11,300	11,065	10,386	10,384	9,637	9,625	9,668	8,811	8,802	8,983
Visual & Performing Arts	17,236	17,674	18,378	19,999	19,552	21,147	21,876	20,933	19,021	20,237	21,155
Architecture and Interior Design	5,967	6,235	6,308	6,966	7,303	6,848	7,179	7,362	6,643	6,950	6,986
Entertainment	6,735	6,576	6,342	6,195	6,329	6,585	7,062	7,062	5,740	6,095	6,609
Communication Arts	7,019	7,468	8,156	8,399	8,720	8,829	8,900	8,874	8,023	8,491	9,015
Digital Media	4,979	4,922	5,052	5,145	4,989	5,618	5,671	6,006	6,417	6,425	6,812
Museums	3,684	3,739	3,891	4,013	4,177	4,418	4,584	4,684	3,784	3,975	4,334
Events	8,190	8,748	8,910	9,317	9,592	10,123	10,305	10,415	10,022	10,438	11,256
Fashion	2,612	2,798	2,657	2,786	2,773	2,736	2,602	2,556	2,708	3,098	3,205
Fine and Performing Arts Schools	1,867	2,115	1,065	2,382	1,121	1,195	1,176	2,410	1,540	1,608	1,708
Music	1,036	1,100	1,133	1,202	1,245	1,301	1,261	1,240	1,121	1,258	1,304
Industrial Design Services	462	473	453	456	454	448	436	417	423	412	414
Art Dealers	699	806	834	836	799	726	685	638	648	675	686
Total	72,078	73,954	74,244	78,082	77,438	79,611	81,362	82,265	74,901	78,464	82,467

Table 5: Relative Change in Employment by Sector

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Publishing and Printing	−2.52	−2.08	−6.14	−0.02	−7.19	−0.12	0.45	−8.86	−0.1	2.06
Visual & Performing Arts	2.54	3.98	8.82	−2.24	8.16	3.45	−4.31	−9.13	6.39	4.54
Architecture and Interior Design	4.49	1.17	10.43	4.84	−6.23	4.83	2.55	−9.77	4.62	0.52
Entertainment	−2.36	−3.56	−2.32	2.16	4.04	7.24	0	−18.72	6.18	8.43
Communication Arts	6.4	9.21	2.98	3.82	1.25	0.8	−0.29	−9.59	5.83	6.17
Digital Media	−1.14	2.64	1.84	−3.03	12.61	0.94	5.91	6.84	0.1	6.02
Museums	1.49	4.07	3.14	4.09	5.77	3.76	2.18	−19.21	5.05	9.03
Events	6.81	1.85	4.57	2.95	5.54	1.8	1.07	−3.77	4.15	7.84
Fashion	7.12	−5.04	4.86	−0.47	−1.33	−4.9	−1.77	5.95	14.4	3.45
Fine and Performing Arts Schools	13.28	−49.65	123.66	−52.94	6.6	−1.59	104.93	−36.1	4.42	6.22
Music	6.18	3	6.09	3.58	4.5	−3.07	−1.67	−9.6	12.22	3.66
Industrial Design Services	2.38	−4.23	0.66	−0.44	−1.32	−2.68	−4.36	1.44	−2.6	0.49
Art Dealers	15.31	3.47	0.24	−4.43	−9.14	−5.65	−6.86	1.57	4.17	1.63
Total	2.6%	0.39%	5.17%	−0.82%	2.81%	2.2%	1.11%	−8.95%	4.76%	5.1%

Figure 6: Relative Change in Employment in the Creative Economy 2012-2022



Lightcast uses Bureau of Labor Statistics and Census data along with a proprietary model to project employment in future years. For comparison the 2020 EDC report, we present Lightcast's 5-year projections for creative economy subsectors.[9] The projections estimate a steep decline in Publishing and Printing employment. The largest projected increases in employment are in Events and Visual and Performing Arts, which they expect each to grow by about 2,000 jobs over the next 5 years.

9 Since 2020, the modeling program EDC used for their 2020 report changed its name from "Emsi" to "Lightcast."

Figure 7: Projected Industry Employment Trends 2022-2027

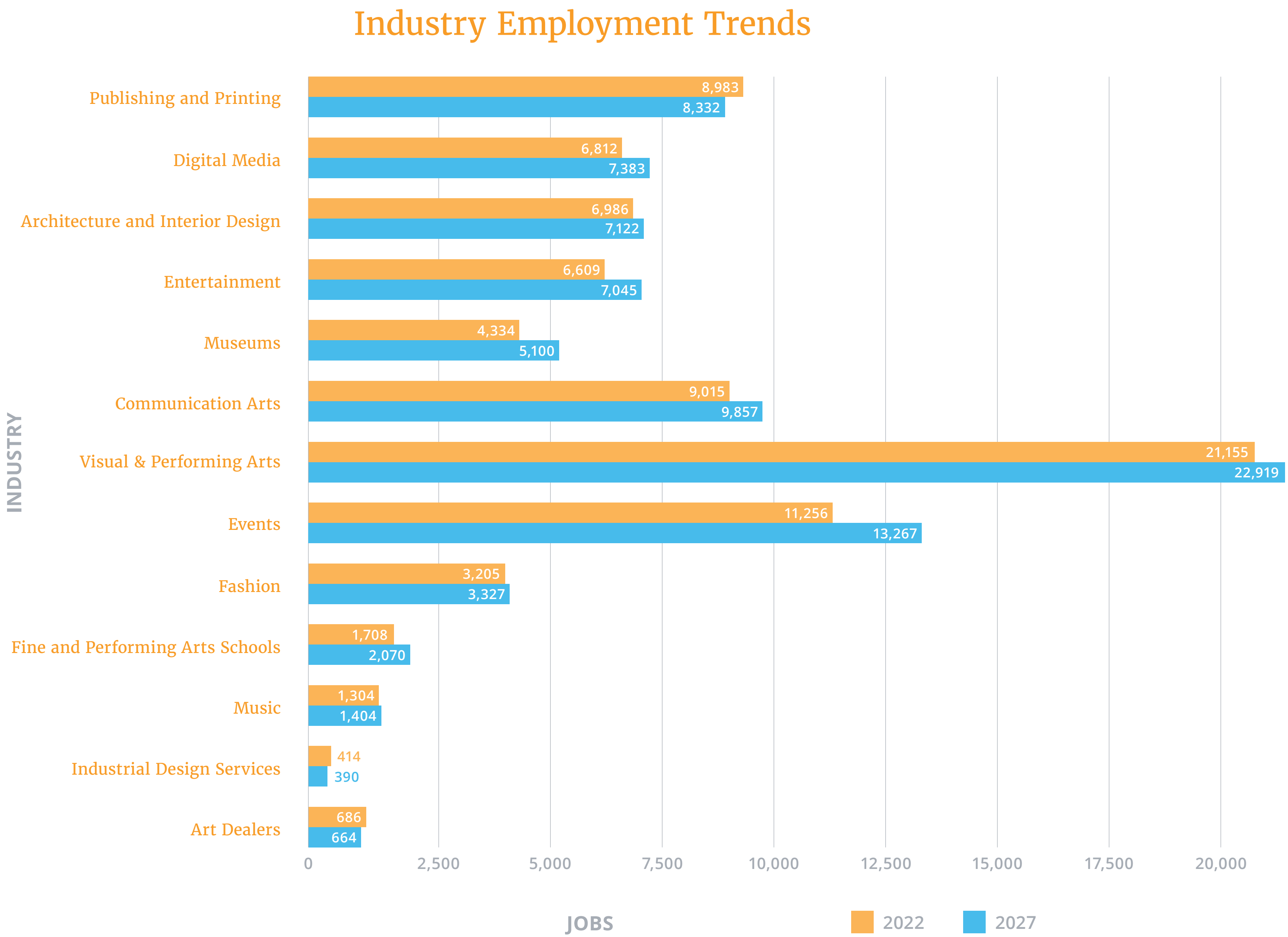


Figure 8: Average Annual Earnings by Sector 2012 vs 2022

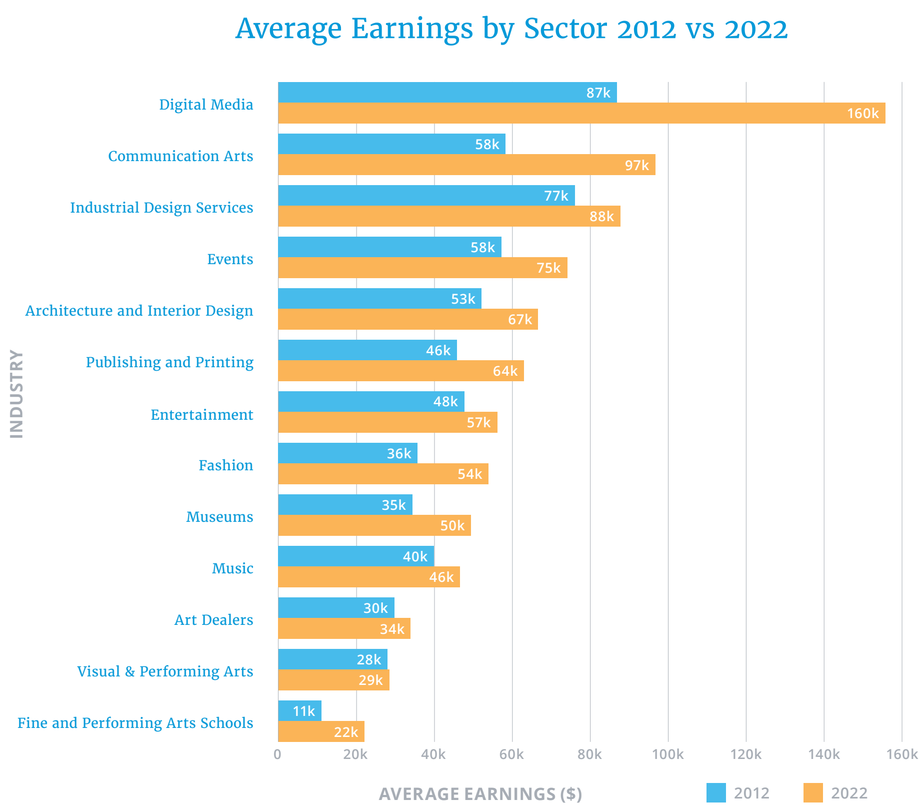


Table 6: Average Annual Earnings by sector 2012 vs 2022

	2012	2022
Publishing and Printing	$46,173	$63,576
Visual & Performing Arts	$28,341	$28,594
Architecture and Interior Design	$52,717	$67,058
Entertainment	$48,336	$56,585
Communication Arts	$58,454	$97,351
Digital Media	$87,042	$156,497
Museums	$34,865	$50,092
Events	$58,035	$74,983
Fashion	$36,328	$54,372
Fine and Performing Arts Schools	$11,330	$22,475
Music	$39,943	$46,458
Industrial Design Services	$76,795	$88,337
Art Dealers	$30,146	$34,237
Total	**$46,808**	**$64,663**

Figure 8 and Table 6 show the average annual earnings by sector and compare 2012 to 2022 wages. We see a rise in wages across all sectors, as we would expect as inflation increased the cost of labor over that period. However, we see that wages in digital media, which were already the highest in 2012, enjoyed a much larger increase than other sectors.

Most sectors increased the value they added to the GRP over the last 10 years. In Figure 8, we get some insight into why GRP in Digital Media increased so much more than in other industries between 2012 and 2022. The value these jobs added to GRP increased by 73% since 2012, as it saw substantial wage increases. Printing and Publishing, on the other hand, was the only sector whose value added decreased over this period. This echoes this sector's employment decline over the same period earlier in this section.

The Creative Economy by Occupations

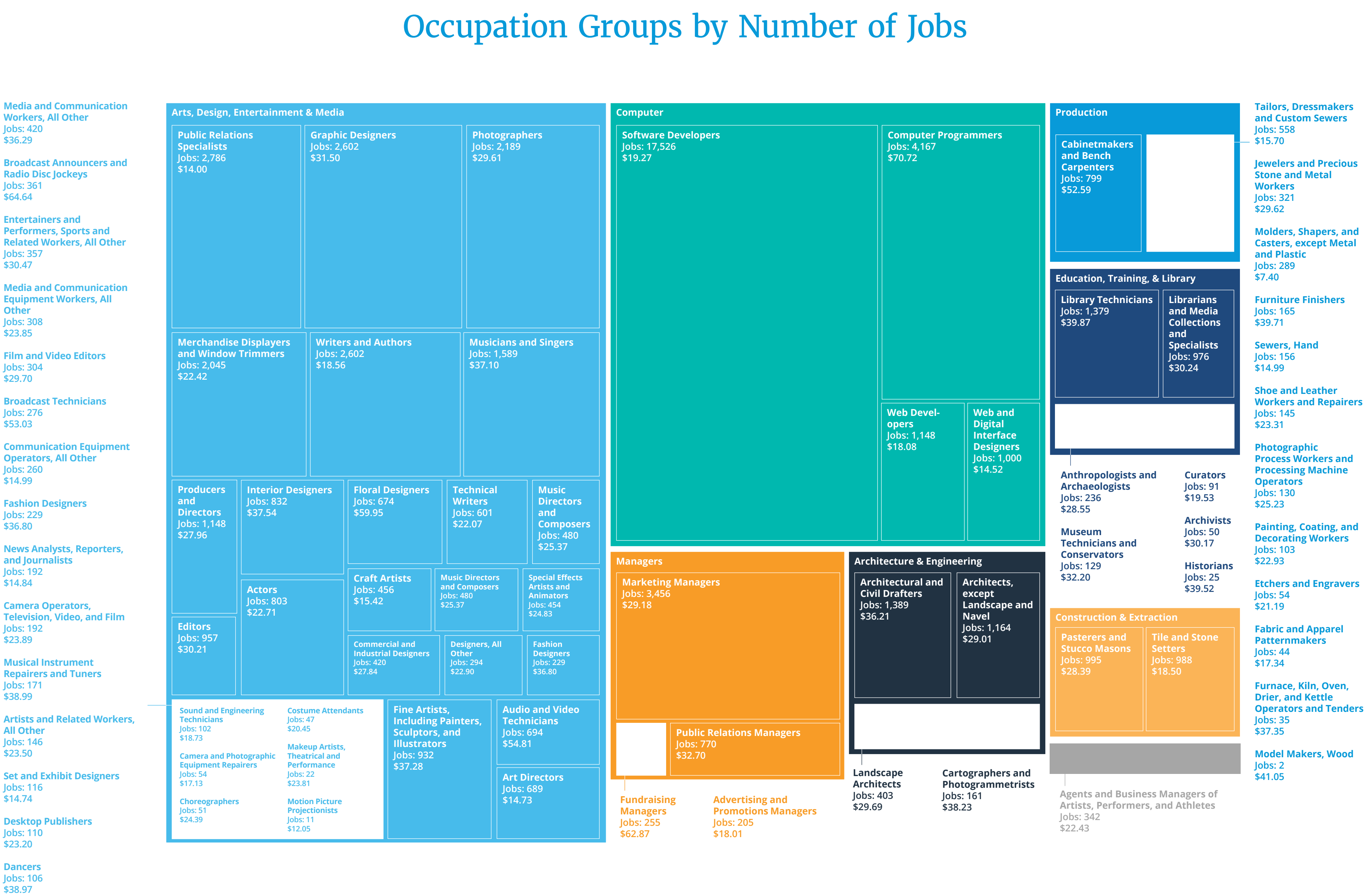
Occupation groups

In addition to industries, we can look at the creative economy through the lens of occupations. Where industries group firms by their activities (for example, The La Jolla Playhouse belongs to the industry "Theater Companies and Dinner Theaters"), occupations group workers by their activities (for example, an actor working for La Jolla Playhouse would be classified in the Occupation "Actors," but an accountant working for the same firm would be in "Accountants and Auditors.") Looking at the creative economy allows us to include creative workers who work for firms that are not in creative industries. For example, this lens allows us to include a graphic designer working for a retail company.

To allow comparison to the EDC report, we grouped occupations they defined as creative into the same 8 occupational groups. Refer to Appendix A for detailed group information.

1. Arts, Design, Entertainment & Media
2. Computer
3. Managers
4. Architecture & Engineering
5. Education, Training & Library
6. Production
7. Construction & Extraction
8. Business & Financial Operations

Figure 9: Number of Jobs and Median Salary in Creative Occupations



In Figure 10, we compare the change in the number of jobs in creative economy occupations over the past five years to the projected change over the next 5. [10] Here, we include only jobs classified as creative jobs within these occupational groups (see Figure 9.) Business and Financial Operations has experienced the fastest growth over the past five years, and projections suggest this growth will accelerate over the next five. Managers, Construction and Extraction, and Education and Library creative jobs are also expected to grow faster in the next five years than they did in the previous five. Only Production jobs have shrunk over the past five years.

Employers and Hiring

Where are people in creative occupations working? What educational programs are they coming out of?

10 According to Lightcast projections.

Figure 10: 5-year Past vs. Projected Occupation Growth

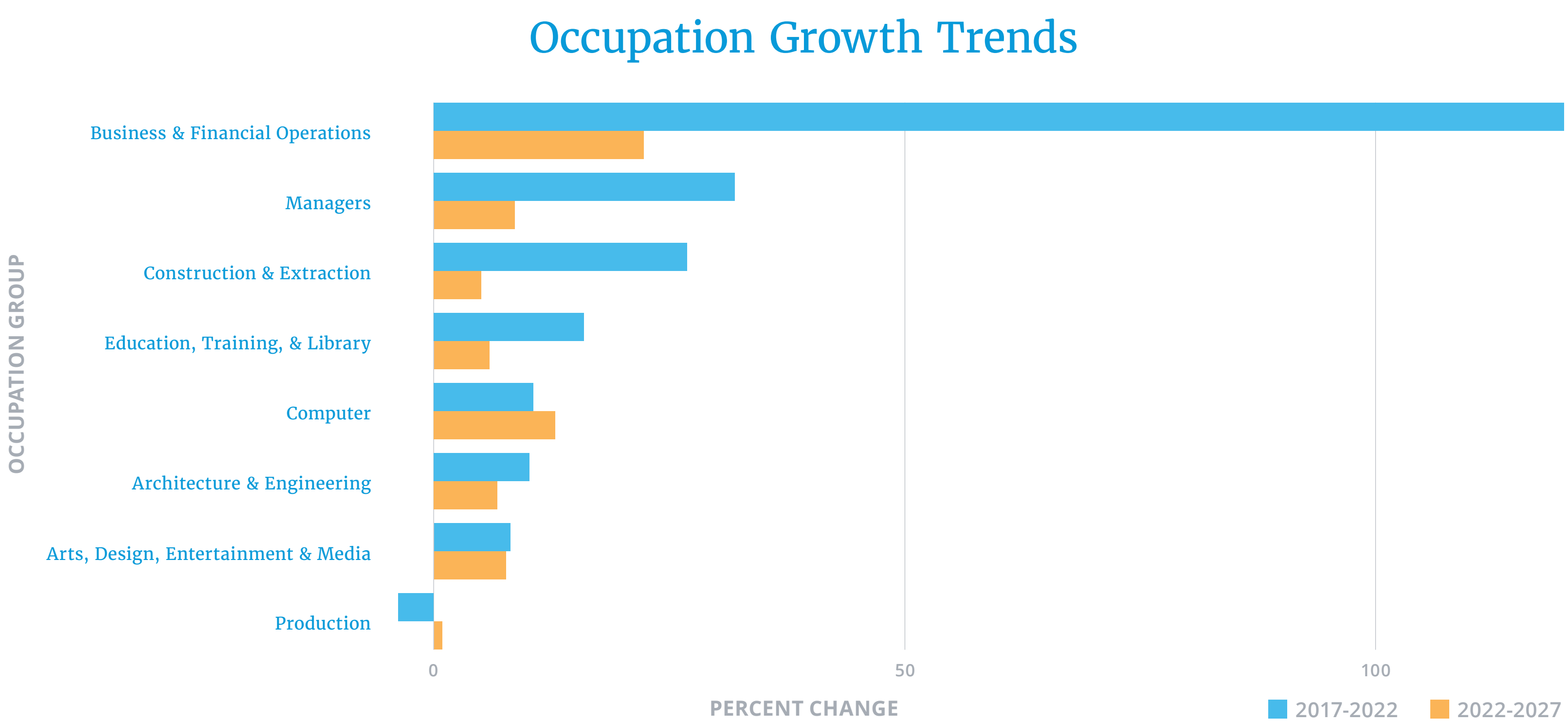


Figure 11: Educational Pipeline for Creative Occupations

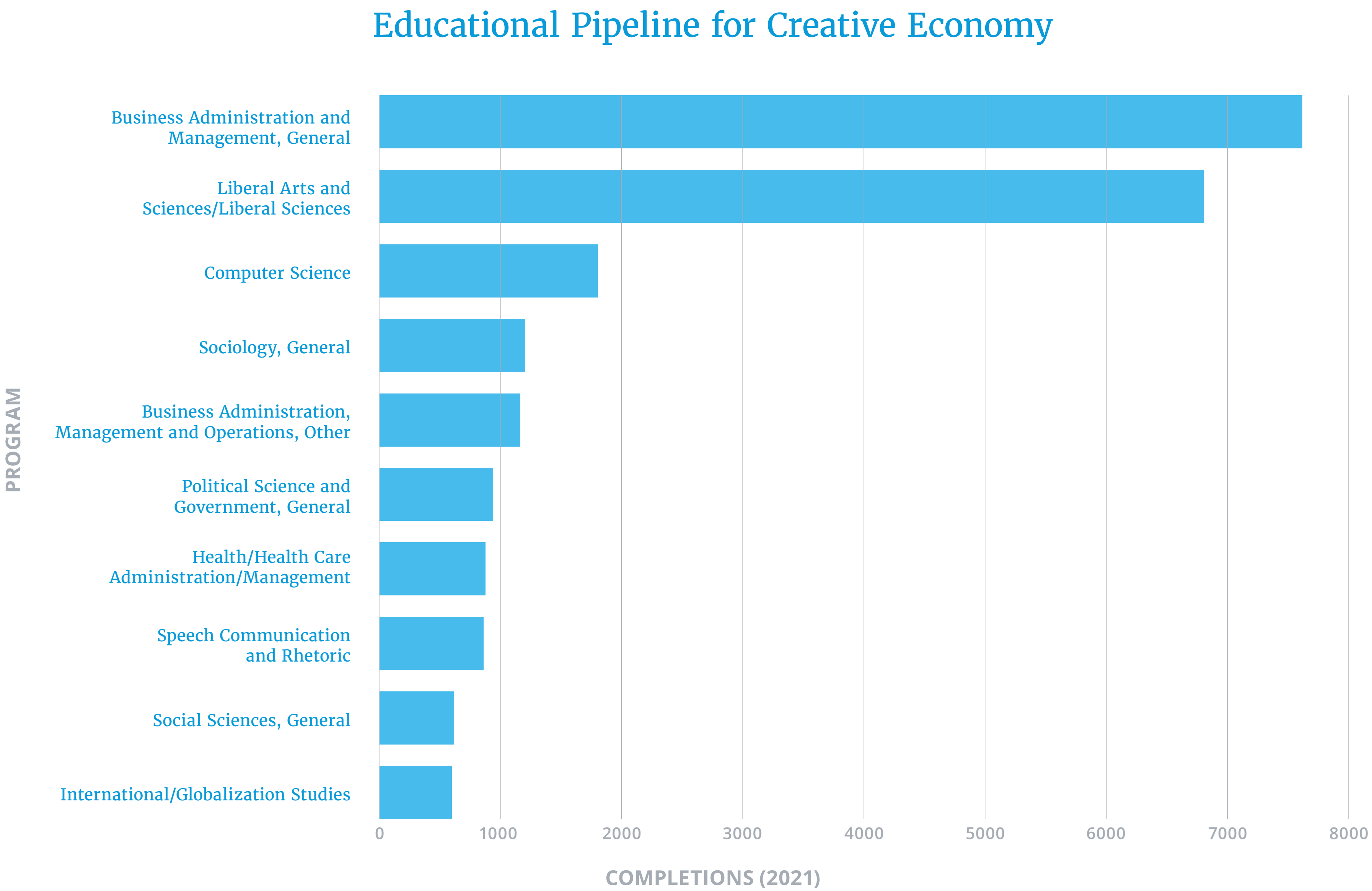


Figure 12: Firms by Number of Employees

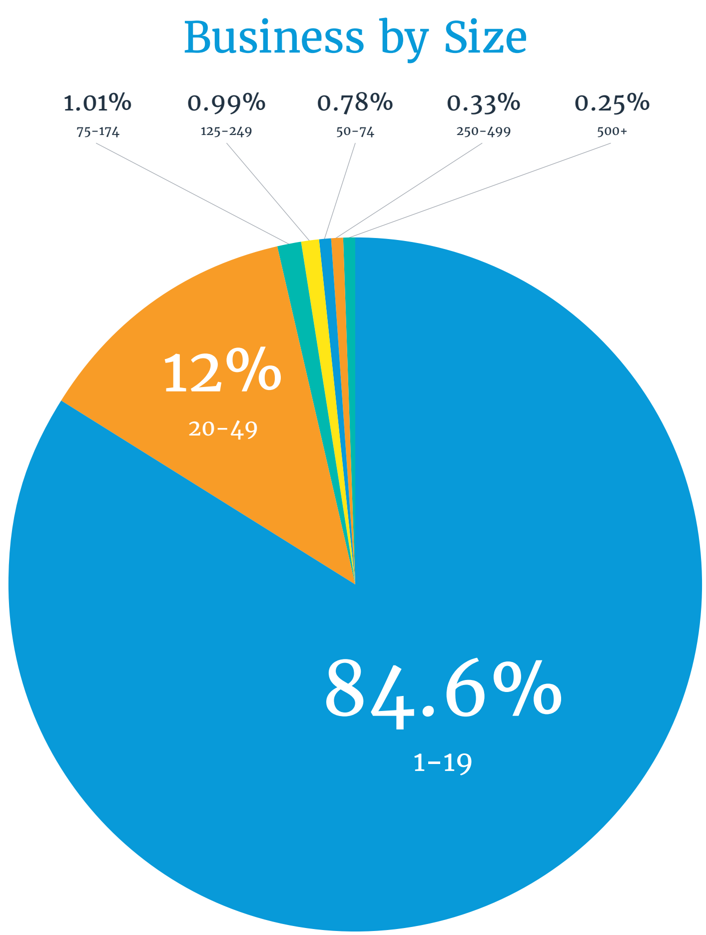
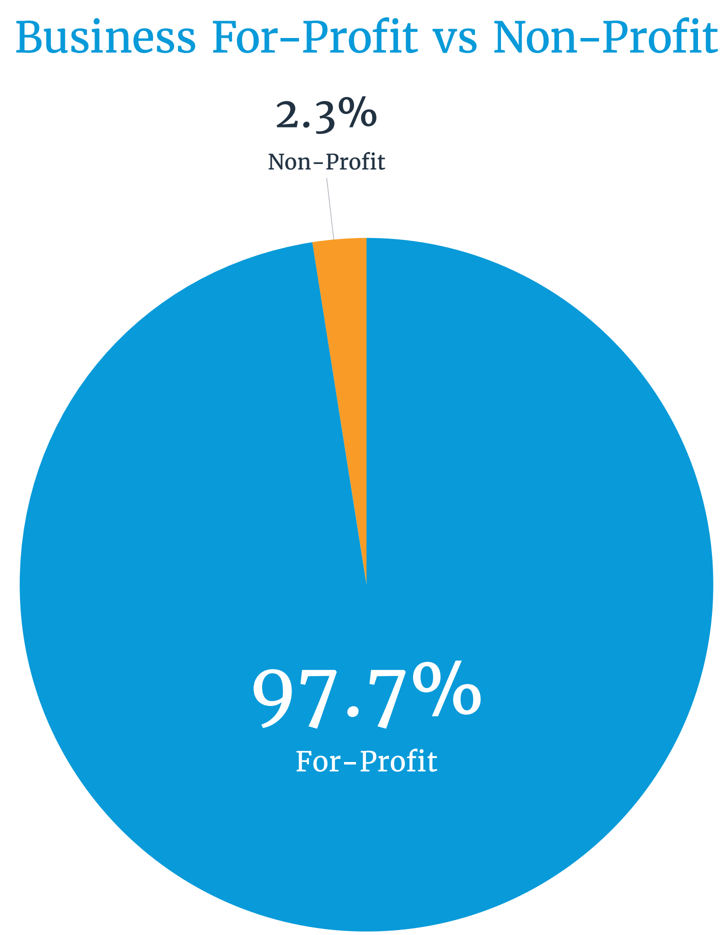


Figure 13: Firms by Non-Profit and For-Profit Status



The overwhelming majority of businesses in creative industries in San Diego are small, employing between one and 19 employees. The next largest group are firms between 20 and 49 employees, which is still considered a small business by most measures. [11]

Employees in these occupations are overwhelmingly working for for-profit organizations.

11 Data for business size and for-profit and nonprofit companies comes from DatabaseUSA.com. Data provided by Lightcast as a convenience to its clients. https://databaseusa.com/

Top Employers

The employers below include the top 10 employers by business size for all occupations in the Creative Economy, and the top 10 employers for all industries in the creative economy.[12] Refer to Appendix A for more details on occupation and industry groups.

12 Source: DatabaseUSA.com

Table 7: Top Employers – All Creative Occupations

Business Name	Industry Name	Business Size
San Diego Zoo	Zoos and Botanical Gardens	2300
Forcepoint	Software Publishers	1609
California State University	Libraries and Archives	1558
ServiceNow	Software Publishers	1084
Omni La Costa Resort & Spa	Convention and Trade Show Organizers	996
Aarrow Sign Spinners	Advertising Agencies	950
Eset Llc	Software Publishers	880
Union-tribune Publishing Co	Newspaper Publishers	850
Advanced Marketing Services Inc	Book Publishers	850
Town and Country Resort	Convention and Trade Show Organizers	825

Table 8: Top Employers – All Creative Sectors

Business Name	Profiles	Percent
Qualcomm	2,874	1.97%
Northrop Grumman	976	0.67%
Intuit	973	0.67%
Google	893	0.61%
Amazon	874	0.06%
University of California	821	0.56%
Apple	801	0.55%
General Atomics	753	0.52%
Illumina	658	0.45%
ServiceNow	643	0.44%

Self-Employment in San Diego's Creative Economy

Many workers in the creative economy don't work for an employer at all, they work for themselves. This section describes labor market data on these workers.

The largest group of self-employed creative workers are Writers and Authors, followed by Fine Artists. Table 9 shows the top ten jobs of self-employed workers in the creative economy and their median hourly earnings.

Table 9: Top 10 Jobs Among Self-Employed Creatives

SOC	Description	Employed in Industry Group (2022)	Median Hourly Earnings
27-3043	Writers and Authors	1236	23.57
27-1013	Fine Artists, Including Painters, Sculptors, and Illustrators	821	11.32
27-2042	Musicians and Singers	669	24.98
27-1012	Craft Artists	388	6.67
11-9199	Managers, All Other	314	22.29
27-2011	Actors	207	30.8
27-2099	Entertainers and Performers, Sports and Related Workers, All Other	179	25.05
27-4021	Photographers	176	26.68
27-3031	Public Relations Specialists	130	39.62
13-1161	Market Research Analysts and Marketing Specialists	127	28.44

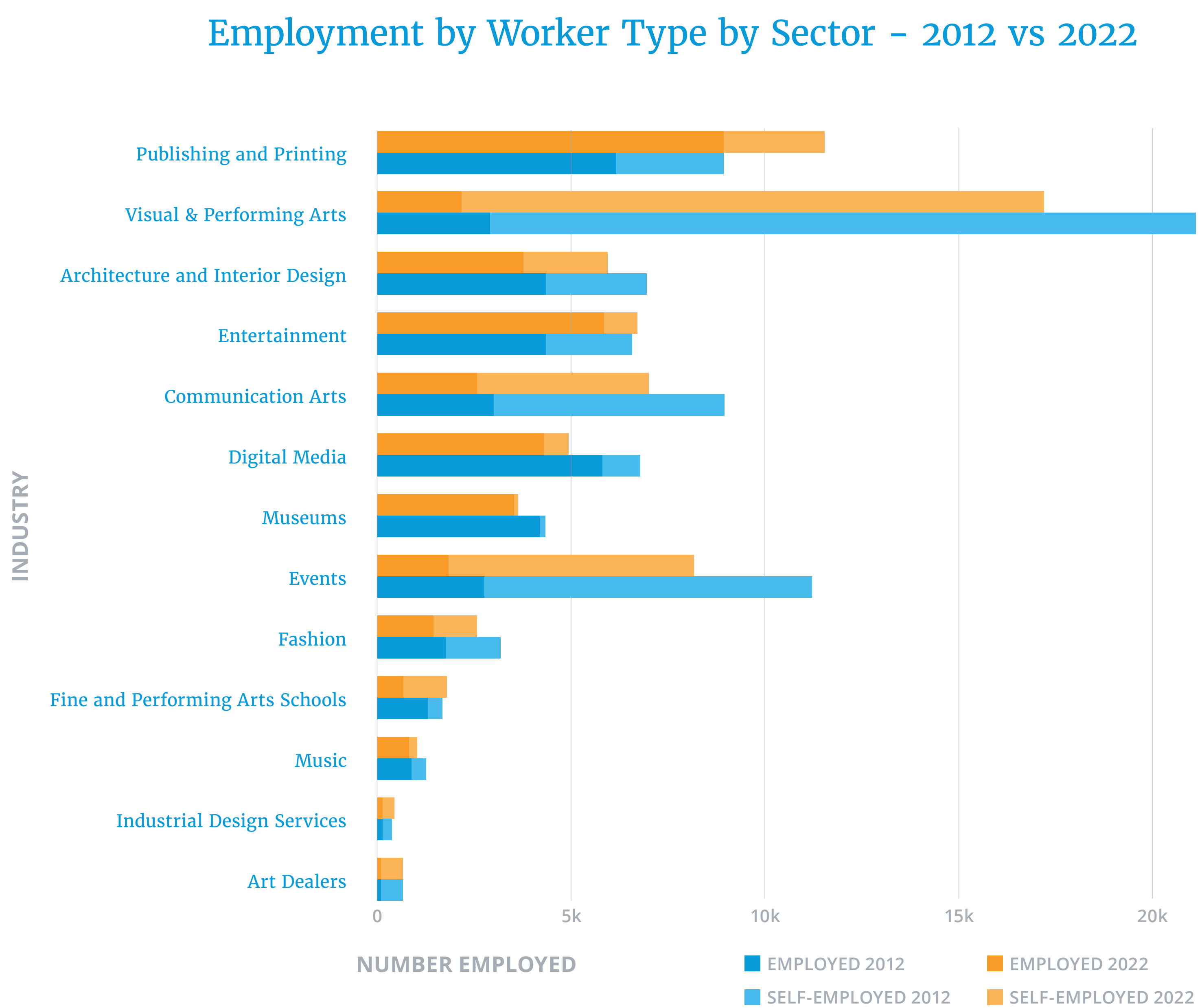
In Figure 14 and Table 10, we see employment in 2012 and 2022 broken out by whether those workers are self-employed or not. There is overall more self-employment in 2022, reflecting a nationwide trend coincident with COVID-19: although the self-employment rate seemed to be steadily decreasing since about 2007, this trend reversed starting in 2020.[13]

13 Self-Employment Grows during COVID-19 Pandemic. (n.d.). Retrieved March 19, 2023, from https://www.stlouisfed.org/on-the-economy/2022/jul/self-employment-returns-growth-path-pandemic

Table 10: Employment and Self-Employment in Creative Industries 2012 and 2022

	2012 Employed	**2022** Employed	**2012** Self-Employed	**2022** Self-Employed
Publishing and Printing	8,988	6,214	2,605	2,768
Visual & Performing Arts	2,238	2,963	14,998	18,191
Architecture and Interior Design	3,805	4,425	2,162	2,561
Entertainment	5,903	4,390	832	2,219
Communication Arts	2,622	3,101	4,397	5,914
Digital Media	4,314	5,822	665	990
Museums	3,629	4,287	55	46
Events	1,898	2,817	6,292	8,438
Fashion	1,502	1,837	1,110	1,368
Fine and Performing Arts Schools	686	1,405	1,180	303
Music	863	915	173	389
Industrial Design Services	216	178	245	236
Art Dealers	155	141	544	545
Total	**36,819**	**38,495**	**35,258**	**43,968**

Figure 14: Employment and Self-Employment in Creative Industries in 2012 and 2022



Diversity and Demographics

In this section, we review diversity within San Diego's creative economy. In Table 11 and Figure 15, we see how gender breakdowns vary across San Diego's creative economy. Fine Arts and Performing Arts Schools and Industrial Design Services have proportionately the most women, whereas Music and Entertainment have the most men.[14] With a county population of 49% men, that 55% of creative industry workers are men means they are overrepresented in the creative industries.

It is not new for industry reports to address the diversity issues within creative industries, as well as their incremental change towards greater diversity. The 2008 report Artists in The Workforce, for example, found that in 2000, although the total labor force was 73% White, 83% of artists identified as White. It also found, however, that between 1990 and 2005, the proportion of artists who were Hispanic, Asian, or American Indian grew from 9% to 15%.[15]

14 Our data for this analysis is limited to the gender binary because that limitation exists in the underlying data sources.

15 Gaquin, D. (2008). Artists in the Workforce: 1990 to 2005 (No. 48). National Endowment for the Arts Office of Research & Analysis. purl.fdlp.gov

Figure 15: Gender in the Creative Economy

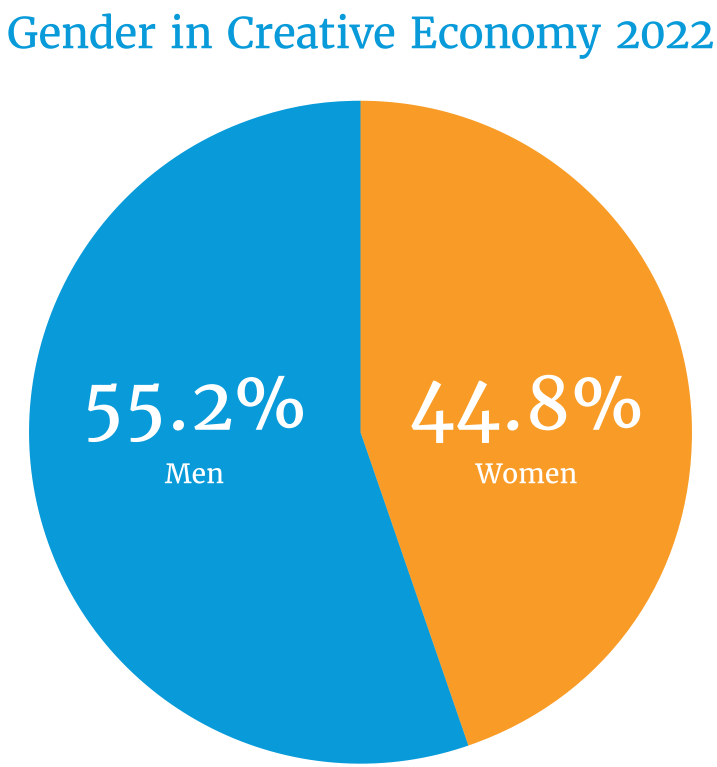


Figure 16: Creative Economy Employment by Race & Ethnicity in 2022

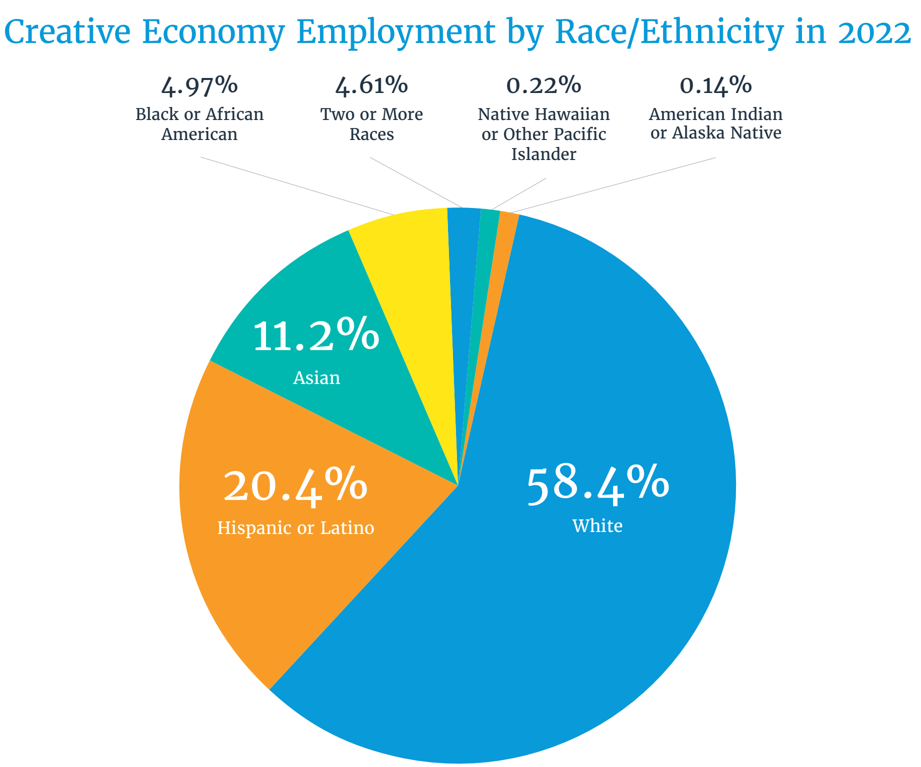


Table 11: Gender in the Creative Economy

	2022 Men	2022 Women	Percent Men	Percent Women
Publishing and Printing	5,294	3,689	58.93	41.07
Visual & Performing Arts	11,962	9,192	56.55	43.45
Architecture and Interior Design	4,408	2,578	63.1	36.9
Entertainment	4,353	2,256	65.86	34.14
Communication Arts	3,894	5,121	43.19	56.81
Digital Media	4,328	2,483	63.54	36.46
Museums	1,843	2,491	42.52	57.48
Events	5,904	5,352	52.45	47.55
Fashion	1,365	1,840	42.59	57.41
Fine and Performing Arts Schools	689	1,020	40.32	59.68
Music	908	396	69.63	30.37
Industrial Design Services	170	244	41.06	58.94
Art Dealers	362	324	52.77	47.23
Total	45,480	36,986	55.15	44.85
San Diego County Population	1,620,600	1,666,300	49.3%	50.7%

Population data source: ACS 2021 1-year estimates, table DP05.[1]

1 U.S. Census Bureau. (2021). DP05 | ACS Demographic and Housing Estimates. Retrieved from https://data.census.gov/table?q=dp05&g=050XX00US06073

Table 12: Racial Diversity in the Creative Economy, its Industries, and San Diego Overall

	Hispanic or Latino	White	Black or African American	American Indian or Alaska Native	Asian	Native Hawaiian or Other Pacific Islander	Two or More Races
Publishing and Printing	25.41%	53.63%	4.24%	0.17%	12.45%	0.27%	3.83%
Visual & Performing Arts	14.82%	65.06%	6.72%	0.07%	6.57%	0.09%	6.68%
Architecture and Interior Design	21.01%	58.36%	3.15%	0.17%	13.13%	0.30%	3.88%
Entertainment	24.75%	58.69%	5.36%	0.17%	7.29%	0.24%	3.50%
Communication Arts	17.84%	62.05%	3.26%	0.19%	11.85%	0.39%	4.43%
Digital Media	12.80%	52.06%	9.16%	0.13%	21.70%	0.21%	3.95%
Museums	27.17%	60.36%	3.27%	0.28%	5.58%	0.37%	2.98%
Events	22.01%	55.86%	3.54%	0.10%	15.03%	0.20%	3.25%
Fashion	36.36%	42.04%	2.15%	0.25%	12.27%	0.19%	6.74%
Fine and Performing Arts Schools	19.32%	58.61%	3.63%	0.23%	13.93%	0.18%	4.10%
Music	27.76%	52.61%	6.44%	0.23%	9.89%	0.15%	2.91%
Industrial Design Services	16.83%	63.94%	2.16%	0.00%	12.02%	0.24%	4.81%
Art Dealers	31.78%	44.75%	6.12%	0.15%	11.52%	0.29%	5.39%
SD Creative Economy	20.37%	58.43%	4.97%	0.14%	11.25%	0.22%	4.61%
San Diego Overall	34.80%	42.60%	4.40%	0.20%	11.80%	0.40%	5.00%

Population data source: ACS 2021 1-year estimates, table DP05.[1]

1 U.S. Census Bureau. (2021). DP05 | ACS Demographic and Housing Estimates. Retrieved from https://data.census.gov/table?q=dp05&g=050XX00US06073

Table 12 shows the racial diversity in the industries that make up San Diego's creative economy. White and multi-racial workers are overrepresented relative to San Diego's overall racial diversity. Hispanic and Latino San Diegans are underrepresented in the creative workforce. Since the population of San Diego is 35% Hispanic, to have only 20% of creative industry workers be Hispanic is not representative of the County population. Some of the sectors where this is most obvious are Digital Media, which includes software publishers and other prerecorded reproducing, and Visual and Performing Arts, which includes theater companies and independent artists.

Table 13: Creative Economy Workers by Race in 2012 and 2022

	Jobs 2012	Jobs 2022	Percent Change 2012–2022
Hispanic or Latino	13,021	16,801	29.03
White	47,090	48,187	2.33
Black or African American	2,548	4,100	60.91
American Indian or Alaska Native	188	118	−37.23
Asian	7,158	9,278	29.62
Native Hawaiian or Other Pacific Islander	184	180	−2.17
Two or More Races	1,889	3,804	101.38

In Table 13, we see the racial distributions among creative economy workers in 2012 and 2022. We see larger increases in Hispanic and Latino, Black and African American, Asian, and multi-racial workers in the creative economy.[16] This could mean that creatives in these demographic groups found homes in the creative economy where they didn't exist or didn't feel welcome before.[17]

16 The numbers of American Indian, Alaska Native, Native Hawaiian and Other Pacific Islander workers are small enough in 2012 that small changes can appear proportionately large. To better assess change in these groups, we would need to expand the geographic reach of this data (for example, by analyzing changes in Southern California) and look at changes year-to-year.

17 To learn more about this topic, we suggest interview studies.

Survey Findings

Employer Context

To contextualize the findings below, we asked about the type of organizations respondents belonged to. Almost half of our responses came from Nonprofit employers. Under half of respondents belonged to a creative professional association. This is different from the Lightcast data, where we had previously identified only around 2% of companies in creative industries as non-profit entities, indicating that our survey results are focused on the experience of non-profit creatives. The measurement of businesses is not perfect, as no organization can confirm the status or type of all existing businesses.[18] However, if measurement methods are relatively consistent over time, we can observe changes in business ownership.

18 D&B Supplier Diversity Solutions Overview. (n.d.). Dun & Bradstreet. Retrieved from https://www.dnb.com/content/dam/english/dnb-solutions/supply-management/Supplier-Diversity-Solutions-Overview.pdf

Figure 17: Number of Firms by Type of Organization

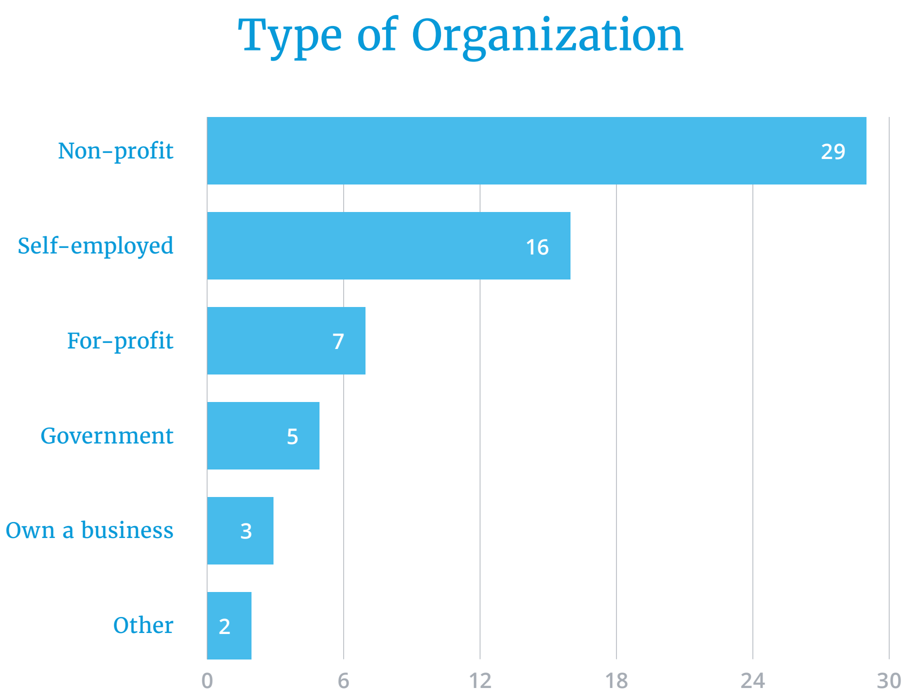
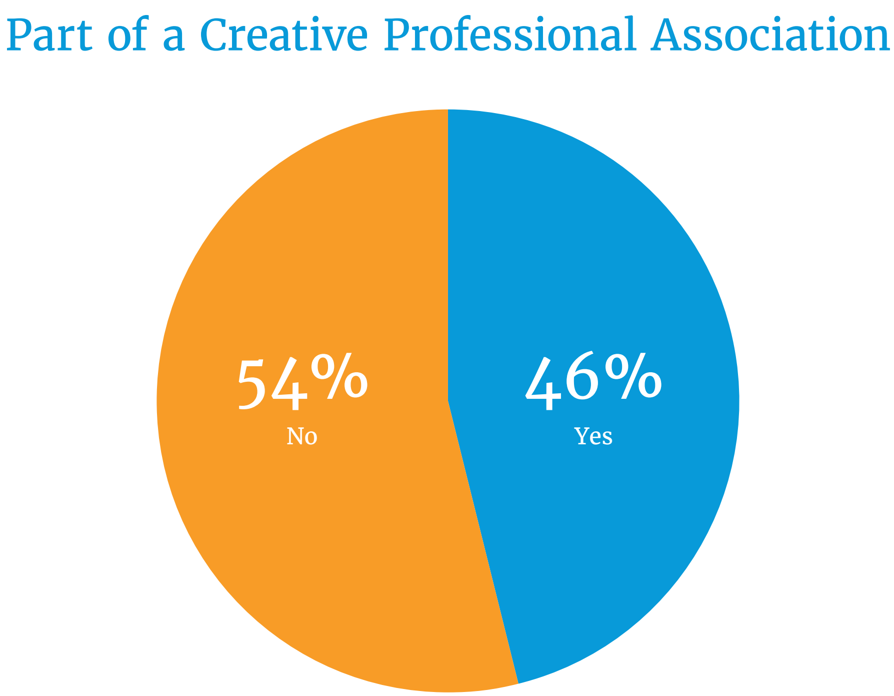


Figure 18: Employers by Membership in a Creative Professional Association



Visual and Performing Arts is the most represented industry, with Industrial Design Services being the least represented at 0 responses.[19] Although many reported their industry as "Other," we re-classified their text responses into the industries below, with the biggest categories being Education and Multiple Industries.[20] Survey respondents' industries differ from our data on industries with the most job counts. According to the data, Publishing and Printing has the most job counts at 6.2k jobs; more than twice as many as Visual and Performing Arts, which 46% of survey respondents identify with.

19 The way the research team at PIC categorized these industries may be different from the way respondents view these industries. For example, PIC categorized Film industries into Entertainment, but respondents in the Film industries selected "Other", where we then re-classified them.

20 Extra categories created include "Education," "Non-Creative Industry," and "Multiple." Multiple encompasses all respondents who cited belonging to two or more of our classified industries.

Figure 19: Percent of Respondents by Industry

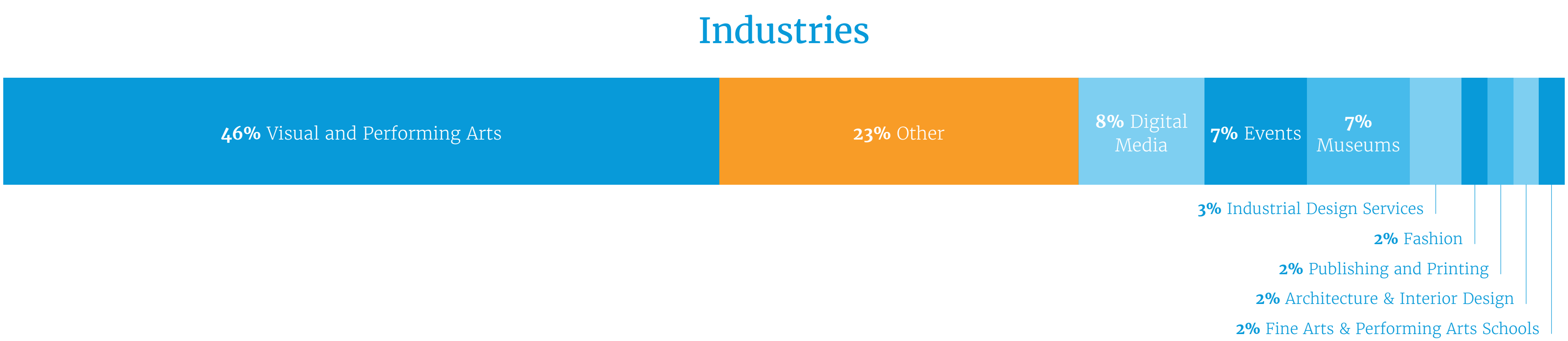


Figure 20: Reclassification of Respondents in "Other" Industries

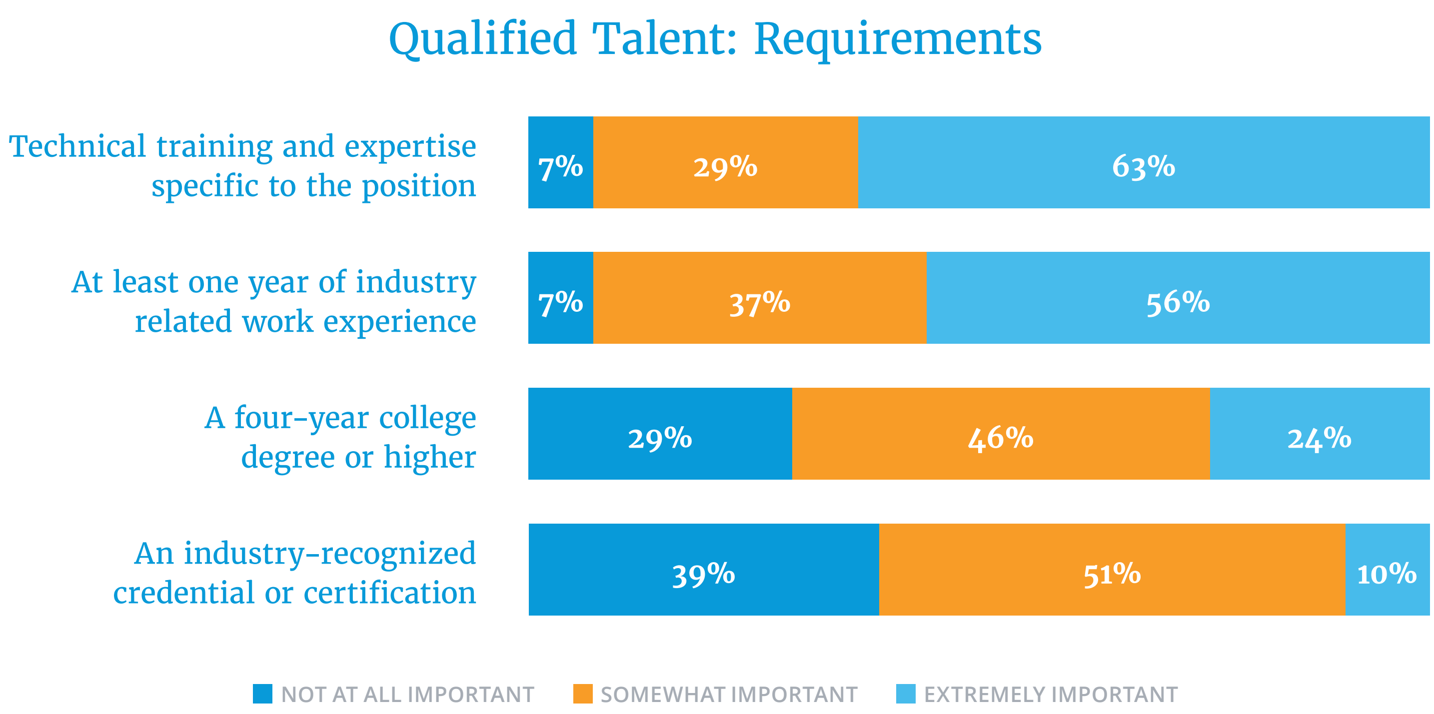
*People who selected "Other" elaborated in-text. These are classifications for their responses

Employer Talent Needs

Surveyed employers believe the most important requirement for potential hires is technical training and expertise, while a credential or certification ranked as their lowest priority. While the ranking is in line with the 2020 findings, industry-recognized credentials jumped from 29% to 39% of employers rating it as "Not at All Important".[21] Still, 70% of employers said a college degree or higher was somewhat or highly important for creative workers to be successful in their careers. According to the data, the programs that graduated the most creative occupation workers were Business Administration and Liberal Arts and Sciences. Some of the creative occupations that we include in this report that might benefit from a Business Administration education include Marketing Managers and Public Relations Managers.

21 San Diego's Creative Economy. (2020). San Diego Regional EDC. https://sd-regional-edc.maps.arcgis.com/apps/Cascade/index.html?appid=7c7a91fcc7984f1db243cbdc5b8d7b1f

Figure 21: Employer Talent Requirements, Education and Experience



Out of those who responded technical training was important, almost half of employers thought job candidates should have between 2 to 3 years of experience to succeed in their work.

We asked employers what types of workers their firms relied on and found 21% of organizations surveyed employed no full-time workers. Over 30% of organizations employed at least some temporary workers, volunteers, contractors, and part-time workers.

Figure 22: Employer Expectations, Years of Experience Required

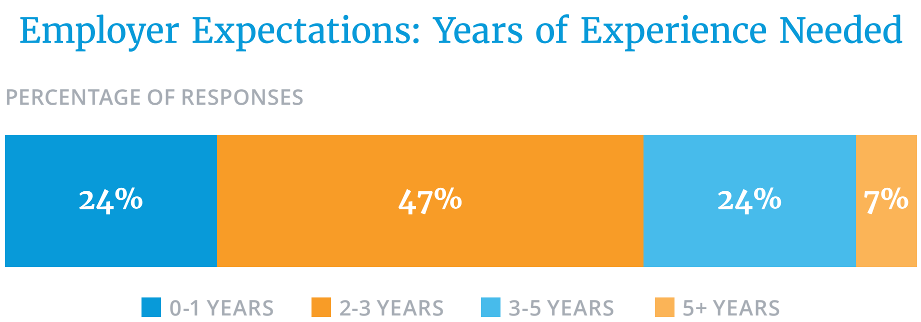
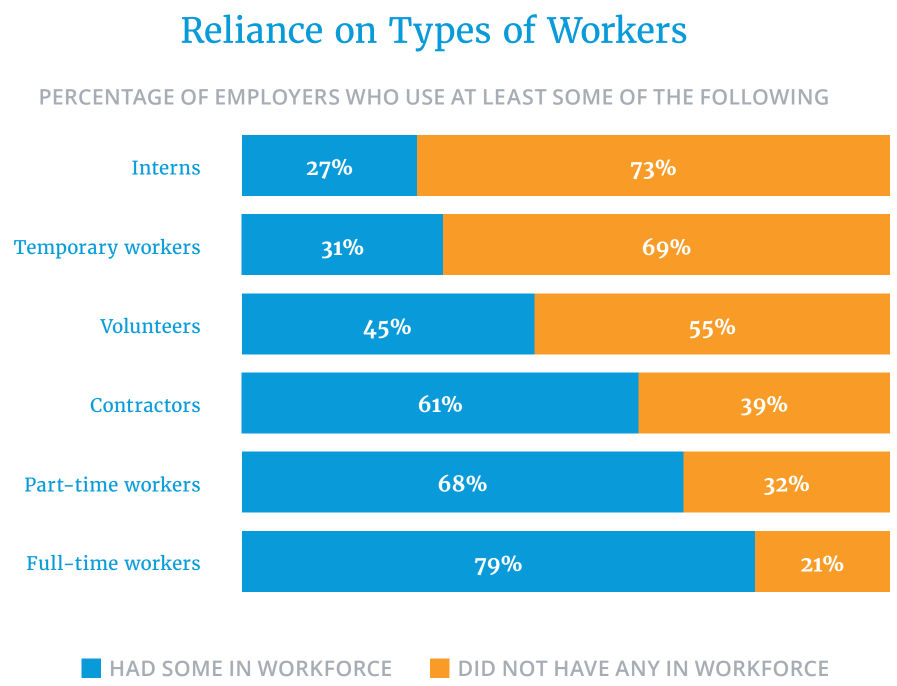


Figure 23: Reliance on Types of Workers, Percentage of Employers Who Employ Them



Local Talent

Almost three-quarters of employers said they sourced most of their workforce locally. Over a third, however, said recruiting a diverse workforce in San Diego County was difficult or very difficult; greater than the share of employers who said it was easy or very easy by 8%. This is consistent with the race data in the creative industries. Almost half (46%) of employer responses came from the Visual and Performing Arts sector, which is made up of 65% White workers and has underrepresentation from all other racial groups except for Black individuals. We recommend further research to understand the sources of this disparity and what can be done to improve racial representation in San Diego's Creative Economy.

Figure 24: Employer Hiring, Local vs. Across the U.S.

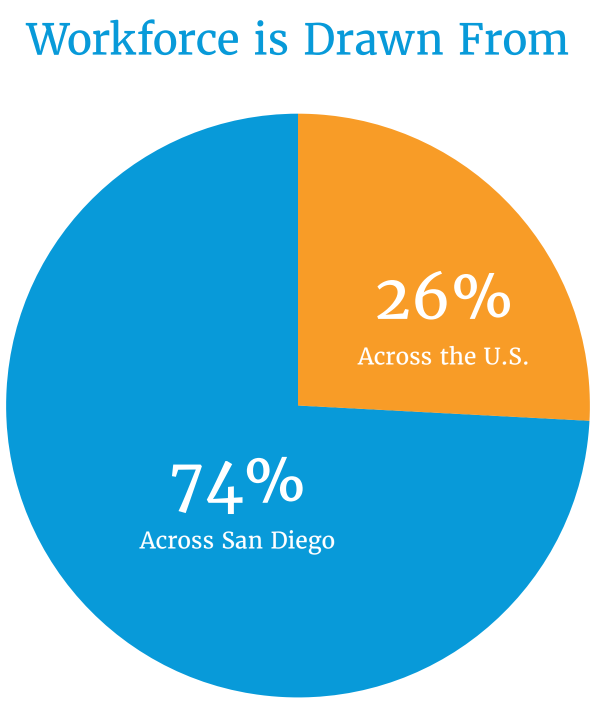
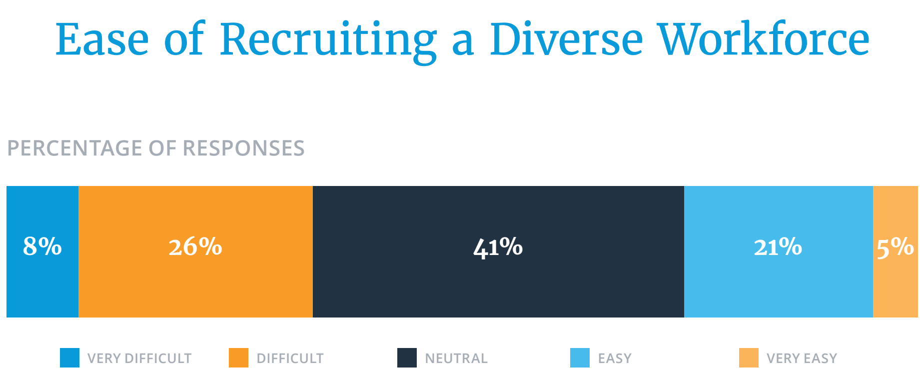


Figure 25: Employer Ease of Recruiting a Diverse Workforce

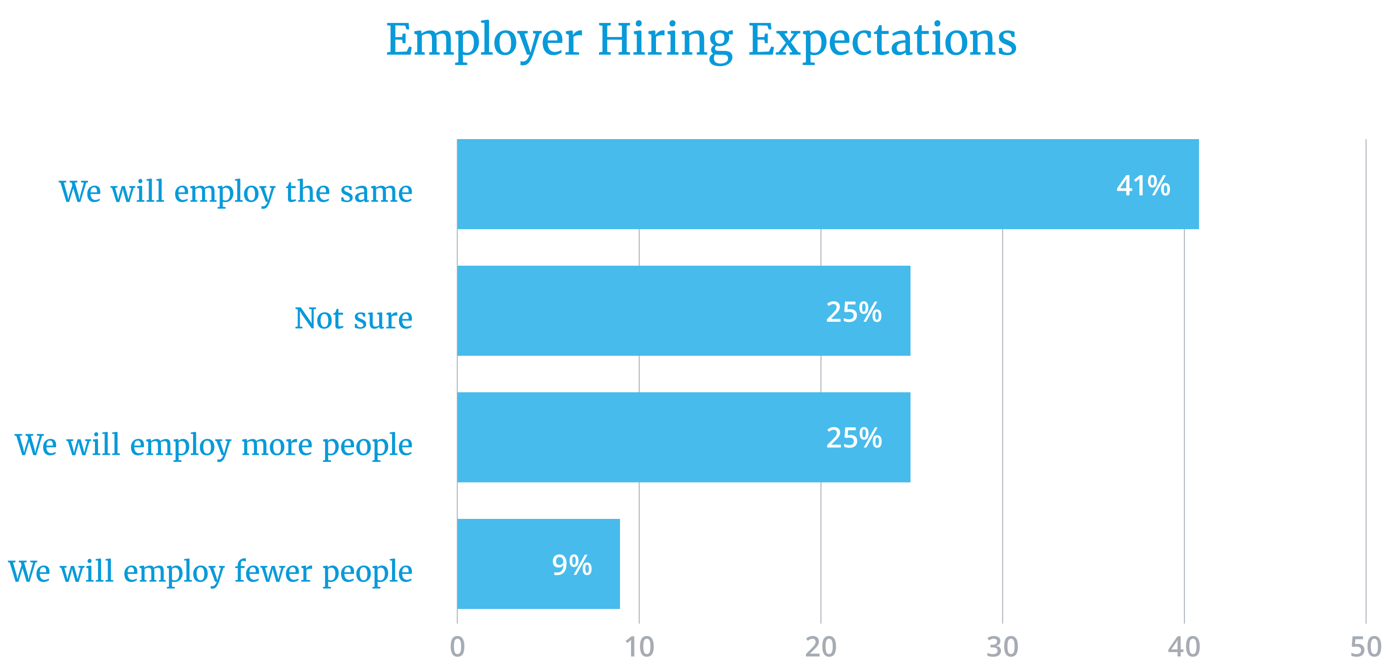


Workforce Changes

More employers expect they will be hiring more rather than fewer people over the next year. Over half of the respondents said they expect no change, or are unsure of any change, in the number of workers.

This is consistent with our data, as most sectors are expected to grow in terms of employment over the next 5 years, with a few exceptions including Publishing and Printing, Entertainment, and Fashion.

Figure 26: Employer Hiring Expectations



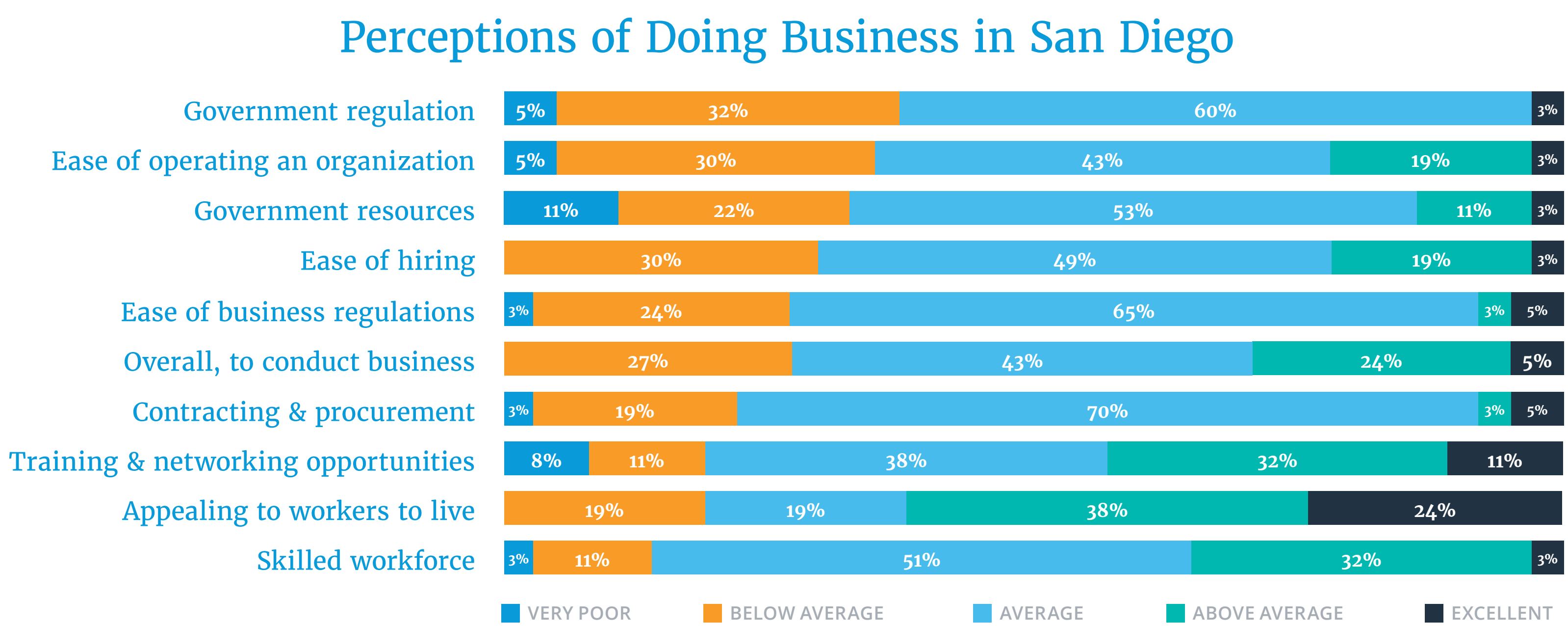
Perceptions of San Diego

Employers are least satisfied with San Diego's government regulation, which they often expressed as one of their main concerns in text, see Employer Concerns below. Many cited California Assembly Bill 5 (AB5)[22] specifically, which extends employee classification status to some gig workers, as a major issue, since small businesses had limited administrative staff to keep up with the HR requirements of having employees instead of contractors. Many of their concerns involve government regulations, resources, and cumbersome processes, and they are most satisfied with the talent in the region.

22 https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB5

Almost all respondents are satisfied with the available talent, with around 90% of respondents rating San Diego as average and above for their skilled workforce. Employers also rated San Diego the best in "appealing to workers to live," and "training and networking opportunities." Even in aspects of most concern to employers, over 60% of respondents rated their San Diego business experience as average and above. The ease of operating an organization ranked second for the worst experience for respondents, with 35% rating it below average and very poor. Still, for over 20% of respondents, their experience was above average and excellent, a much higher rate of satisfaction than their other top 3 most negatively ranked experiences.

Figure 27: Employer Perceptions of Doing Business in San Diego



Demographic Information

A quarter of our employer respondents were White. Similarly, more than half (64%) were women, and over a quarter had either a bachelor's or a master's degree as their highest education level. The racial distribution we see in our respondents is similar as the one we see in our data, with the highest percentage of creative industry workers being White (58%), followed by Hispanic (20%), and Asian (11%). Since women are in general more likely to respond to surveys[23], the gender distribution of responses is not surprising. According to our data, however, men represent around 55% of the workers in creative industries.

When we asked these respondents how they felt in general about their life,[24] on average, respondents expected to be happier in the future than they are now.

23 Sax, L. J., Gilmartin, S. K., & Bryant, A. N. (2003). Assessing Response Rates and Nonresponse Bias in Web and Paper Surveys. Research in Higher Education, 44(4), 409–432. http://www.jstor.org/stable/40197313

24 The Cantril Scale asks people to imagine themselves on a specific step on a ladder, with zero being the worst possible life you could have, and 10 being the best possible one.

Figure 28: Employer Respondents by Race & Ethnicity

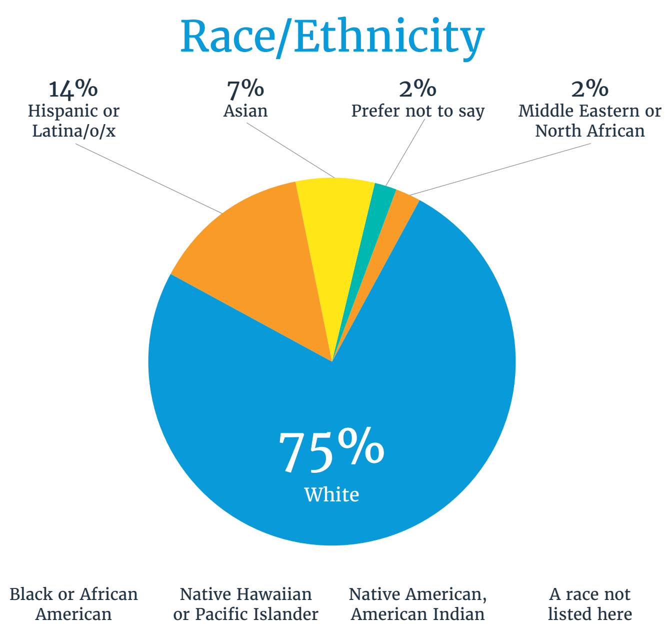


Figure 29: Employer Respondents by Gender

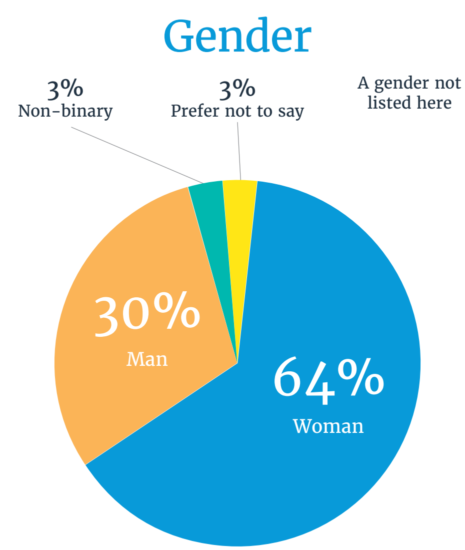


Figure 30: Highest Level of Education, Employers

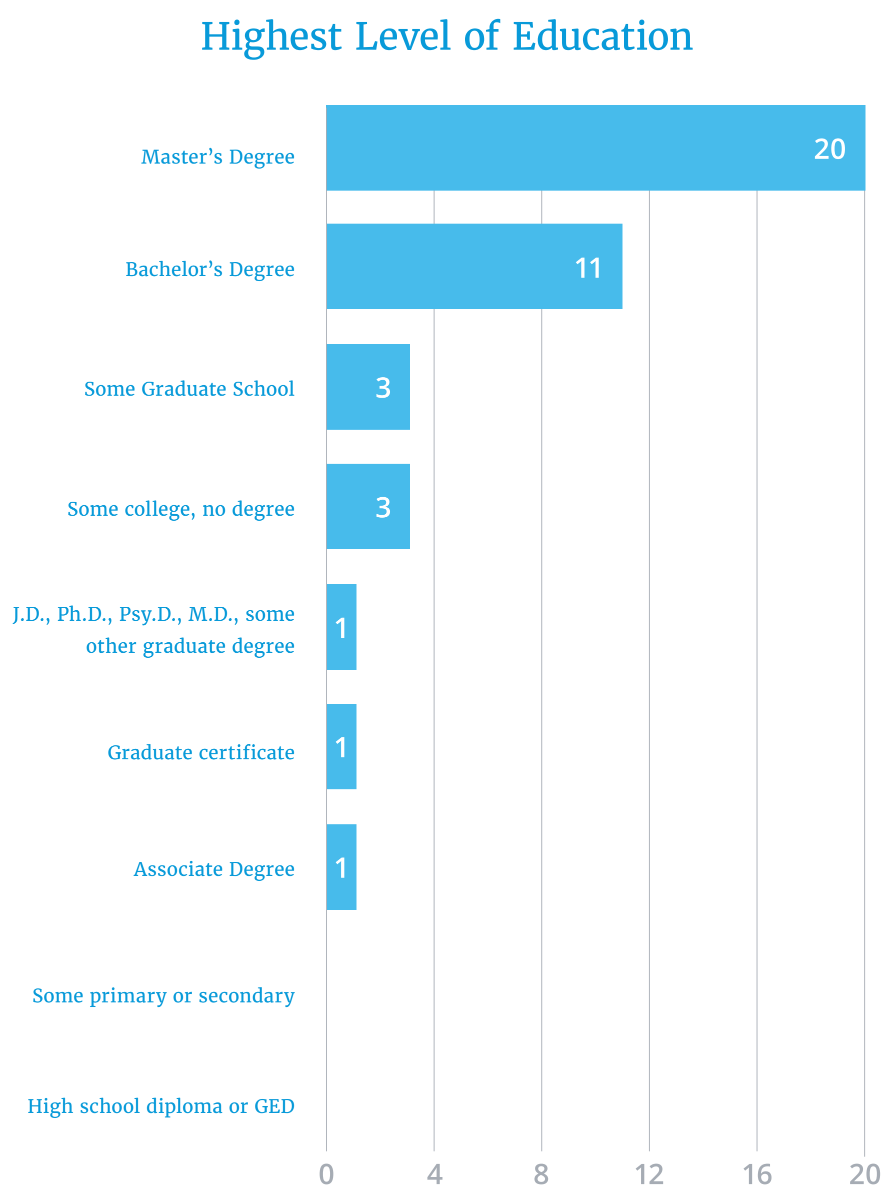
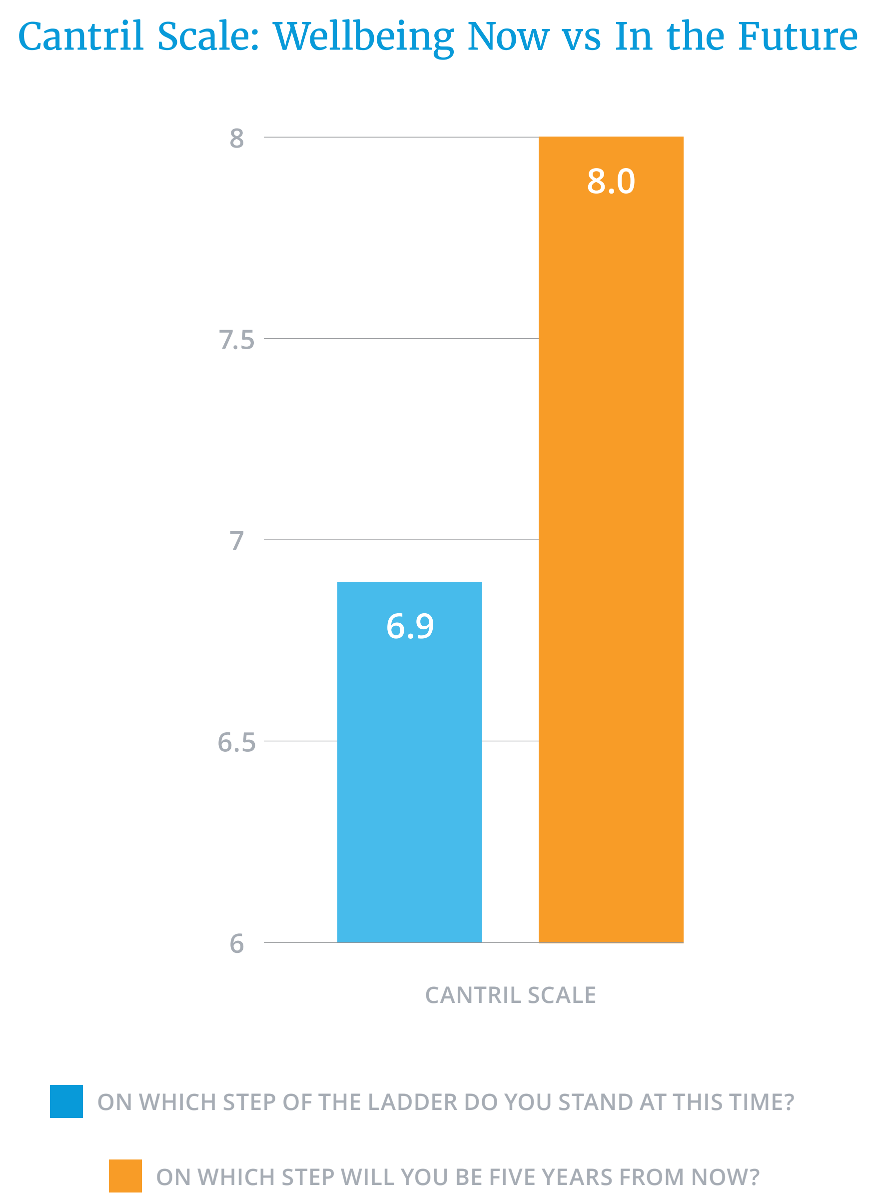


Figure 31: Cantril Scale, Employer Wellbeing Opinions and Expectations



Employed and Self-employed Worker Context

To contextualize the findings below, we asked about the type of organizations respondents belonged to. Almost 70% of our responses came from creative workers with work arrangements different from just one full-time job. Most of our respondents mentioned having a mix of non-full-time jobs, which is reflected in their concerns about being a creative in San Diego. One of the main issues for workers was a general lack of work opportunities, especially stable jobs. Self-employment has experienced very high job growth rates over the past 10 years. According to the data, employee work in creative industries grew by around 1.6k jobs (5%) from 2012 to 2022, while for self-employed workers, it grew by around 8.7k jobs (25%).

Workers would also prefer to spend more of their work time doing creative work; the ideal median was 13% higher than the current time spent on creative activities. When mentioning their lack of time for creative activities, creatives stated having to do too much business development and other small business activities, which ate into the time they had available to be creative. Under half of respondents belonged to a creative professional association.

Figure 32: Number of Creatives by Employment Type

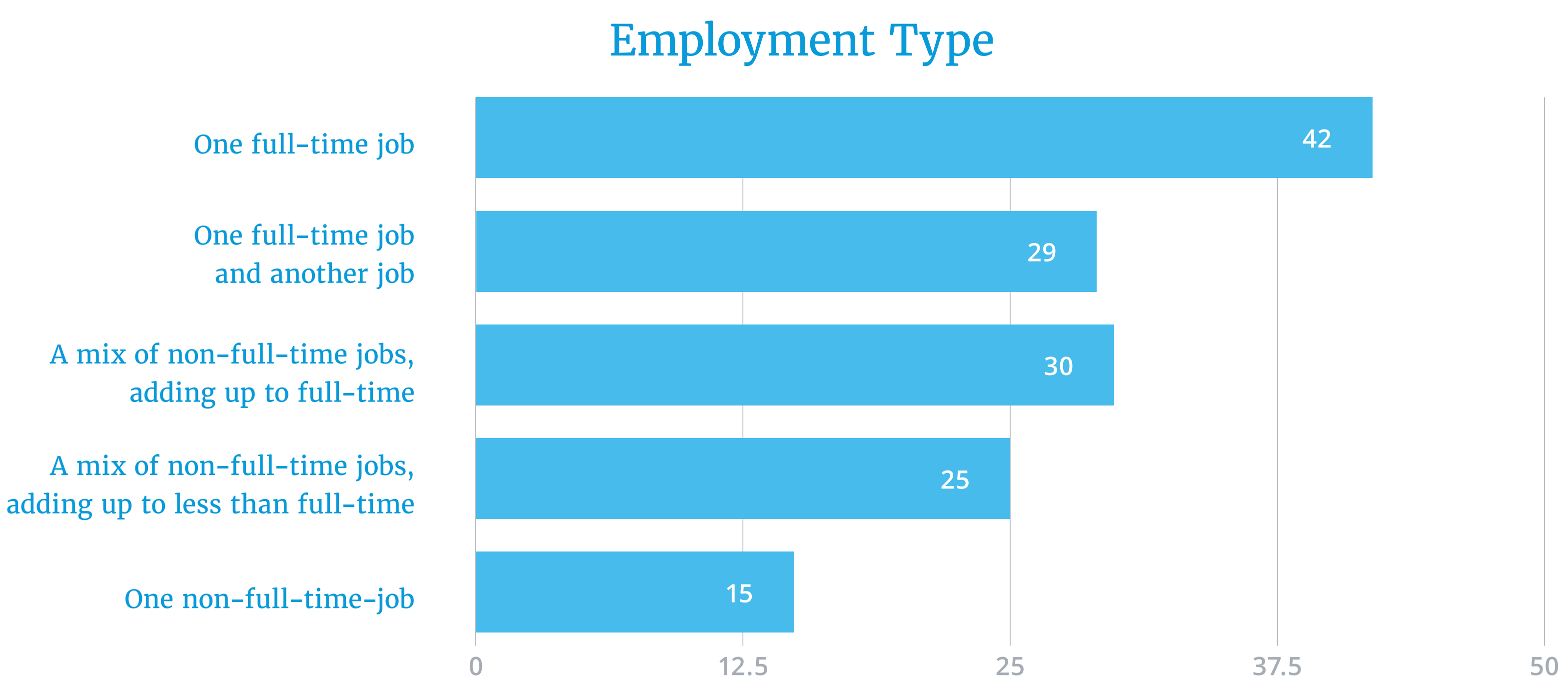


Figure 33: Estimated Percentage of Hours Spent Doing Creative Work (Median)

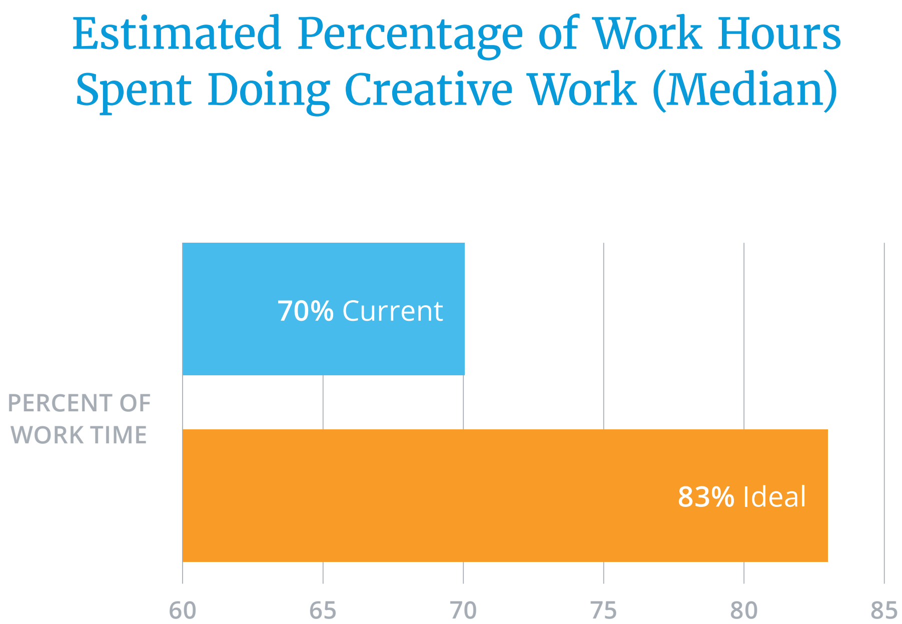
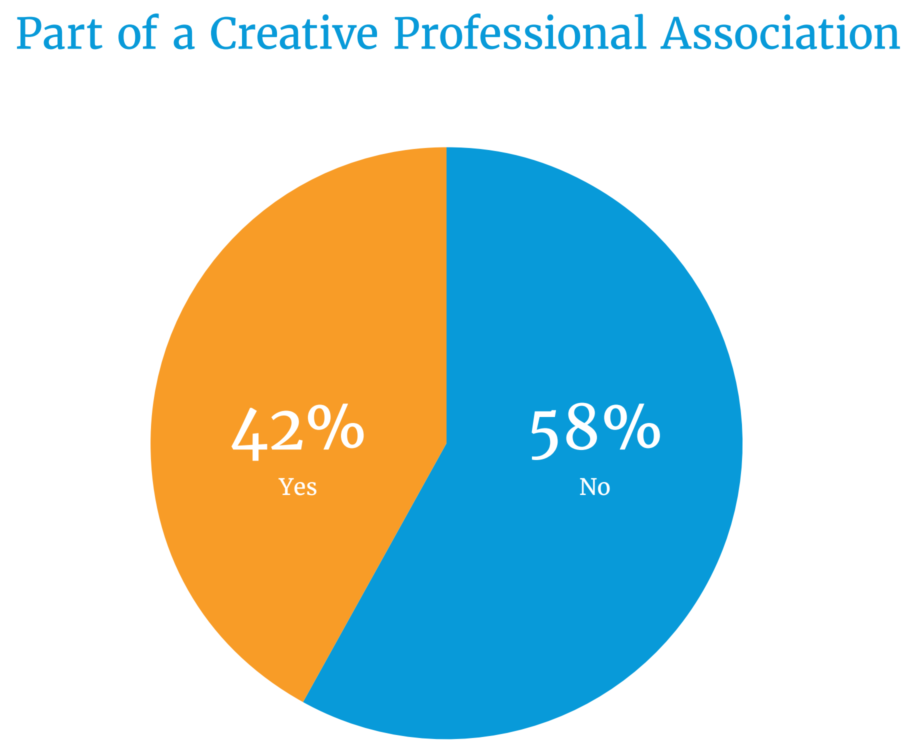


Figure 34: Workers by Membership in a Creative Professional Association



Over half of respondents mentioned they were not a part of a creative association. When asked why, their top responses were that there were not any that applied to them, that they did not believe there would be any benefit, and that they were too expensive and time-consuming. One of workers' main issues with being a creative in San Diego, however, is the lack of a creative community. There is an opportunity to see how these issues relate and how professional organizations, or government institutions, can better offer the community and professional benefits that creatives in the region feel they lack.

Figure 35: Percentage of Workers by Industry

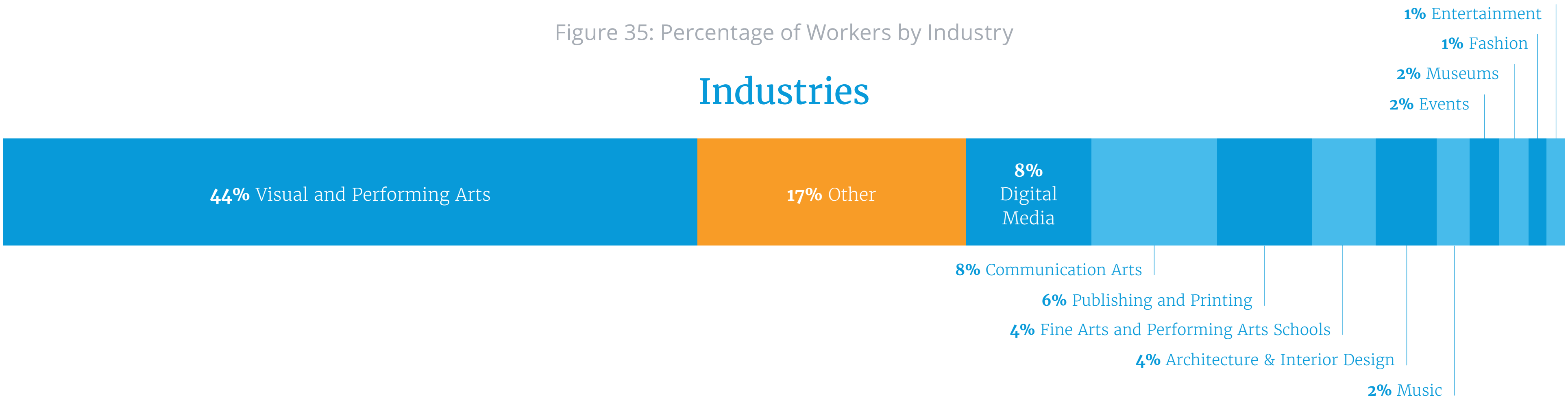
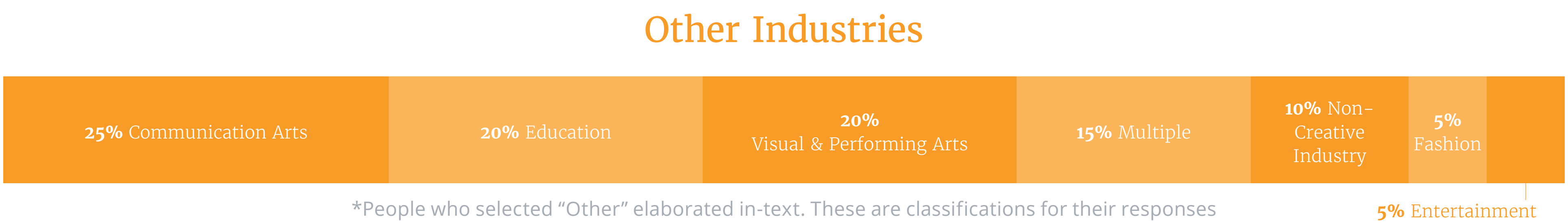


Figure 36: Reclassifying Worker Responses in “Other” Industries



*People who selected “Other” elaborated in-text. These are classifications for their responses

Visual and Performing Arts is the most represented industry among creatives, with Industrial Design Services and Art Dealers being the least represented at 0 responses.[25] In our reclassification of their self-reported industries, the most represented industry was Communication Arts, which includes industries like Graphic Design and Marketing.[26] In our employment data, Publishing and Printing leads as the biggest sector, with 6.2k jobs, followed by Digital Media (5.8k jobs), and Architecture and Interior Design (4.4k jobs). What we see in our respondents’ industries is different from the data on job distribution in creative sectors.

25 The way the research team at PIC categorized these industries may be different from the way respondents view these industries. For example, PIC categorized Film industries into Entertainment, but respondents in the Film industries selected “Other”, where we then re-classified them.

26 Extra categories created include “Education,” “Non-Creative Industry,” and “Multiple.” Multiple encompasses all respondents who cited belonging to two or more of our classified industries.

Job Satisfaction

Creatives stated having very high levels of job satisfaction, with over 80% rating themselves as somewhat or completely satisfied with their jobs. Of those who expressed an opinion on the issue, creatives were least satisfied with their benefits, with over half of creatives showing dissatisfaction with their health and retirement benefits and pay.

They were most content with the physical safety of their jobs and their relationships with coworkers. Many stated “not applicable or no opinion” on chances for a promotion, health insurance, and retirement plan, which may be due to many of our respondents having non-full-time jobs which do not provide these benefits.

Figure 37: Job Satisfaction, Percentage of Responses

Figure 39: Worker Likeliness of Searching for a New Job

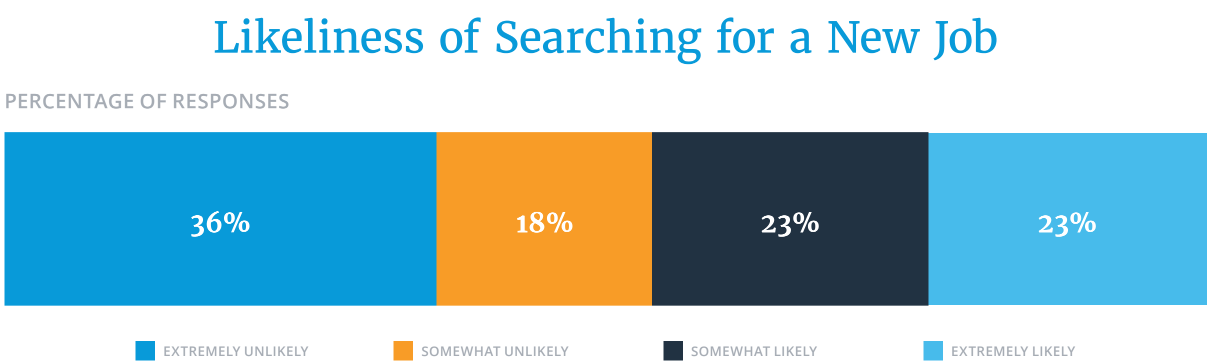
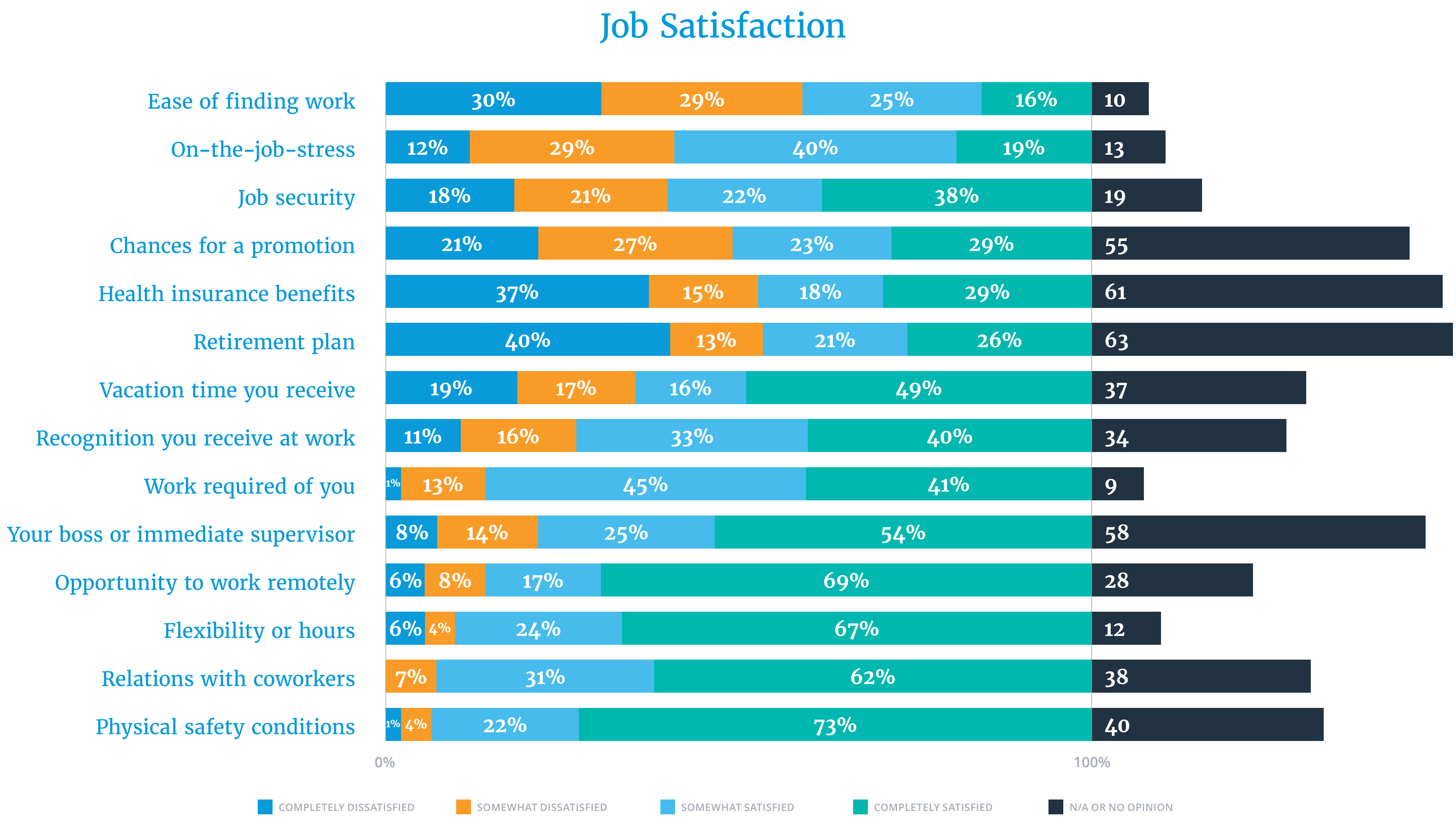


Figure 38: Ranking of Elements of Job Satisfaction



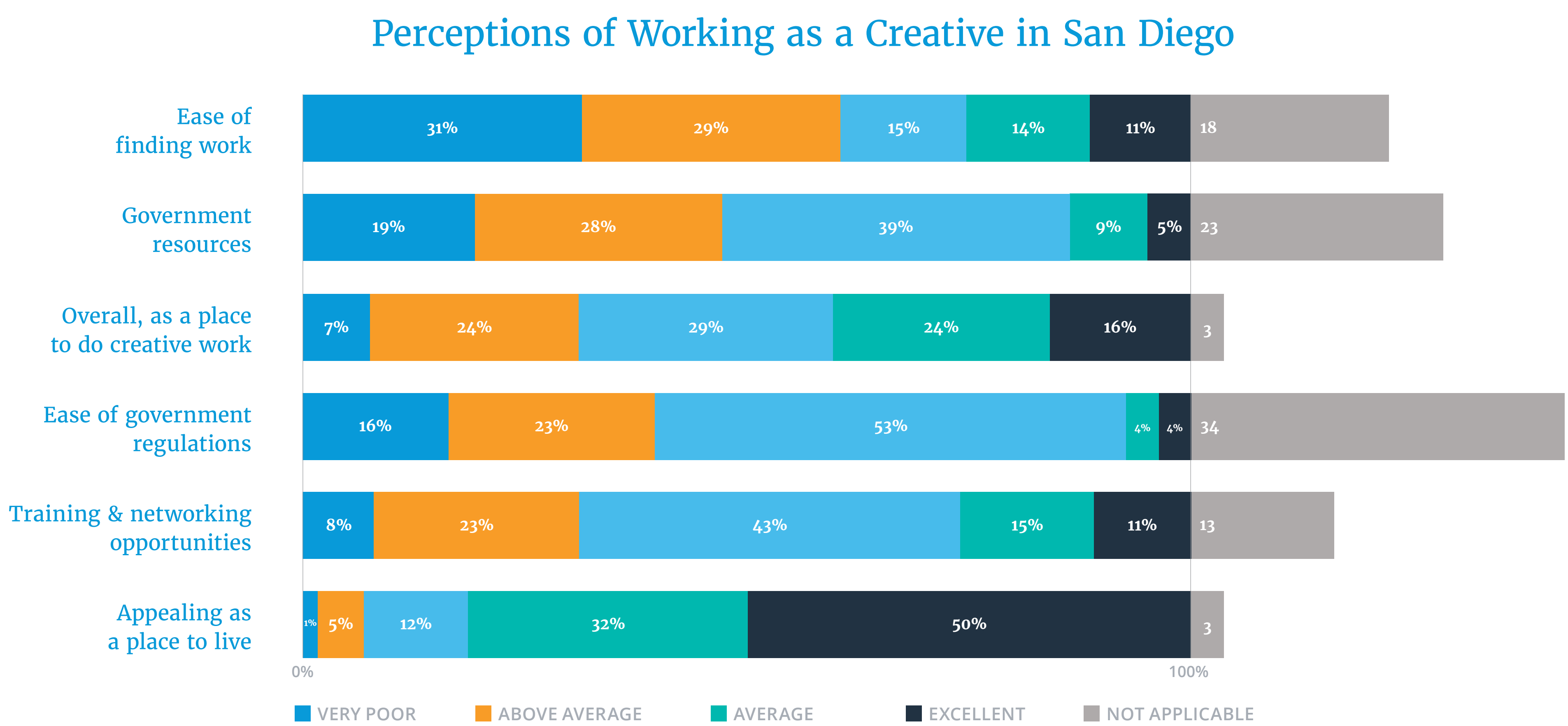
Although concerns were raised about the financial difficulty of being a creative in San Diego, over half of respondents are not looking to leave their profession. This highlights the fact that our respondents are generally satisfied with their jobs.

*Percents are out of those who did not respond “Not applicable or No opinion”

Perceptions of San Diego

Not surprisingly, most respondents find San Diego appealing as a place to live. On all other aspects, more than 30% of creatives were dissatisfied with San Diego as a place to do creative work. Also, consistent with their text responses, creatives rank San Diego the worst for "ease of finding work."

Figure 40: Perceptions of Working as a Creative in San Diego



Demographic Information

There is more racial diversity among our creative worker respondents than among employers. Where 75% of employer respondents were White, 65% of worker respondents identify as White. Where in the employer demographics we had no Black, Native Hawaiian or Pacific Islander, or Native American respondents, we had at least some worker respondents identify with each of these categories. Both the gender diversity and highest level of education in the responses is almost the same, with 67% of worker responses coming from women, and 75% of workers having a bachelor's or a master's degree. Just like with employers, workers expect their future well-being to be greater than their current level of well-being.

In our survey, some respondents shared their concerns regarding the lack of diversity in the Creative Economy. Like in many industries, respondents pointed out that organizational leadership is often disproportionally White men, which aligns with our respondents' demographic differences between employers and workers. Others were concerned with the lack of resources available for underprivileged communities and creatives of color in terms of investment. This is part of a larger conversation around racial inequality not only in the County of San Diego, but around the country.

Figure 41: Percentage of Workers by Race & Ethnicity

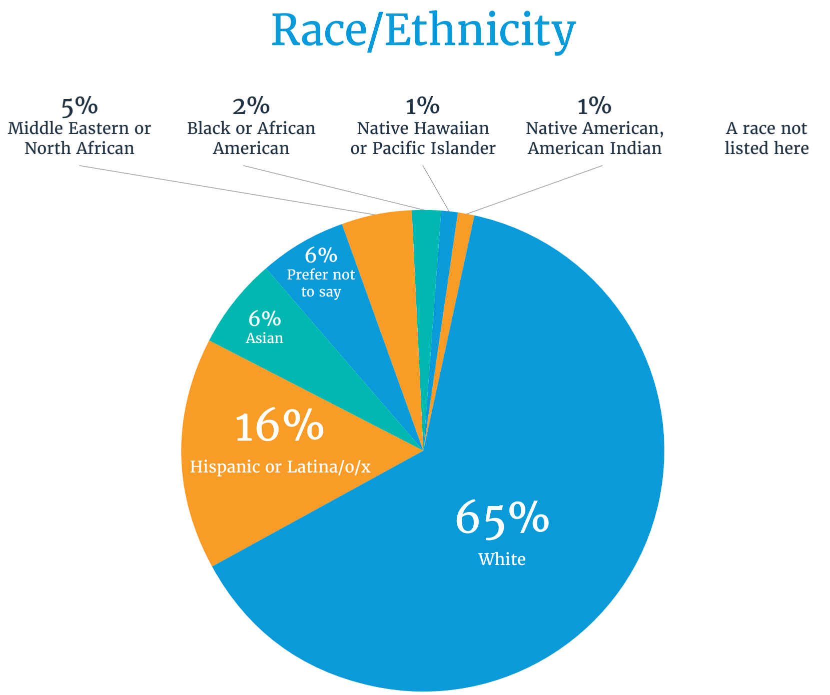


Figure 42: Percentage of Workers by Gender

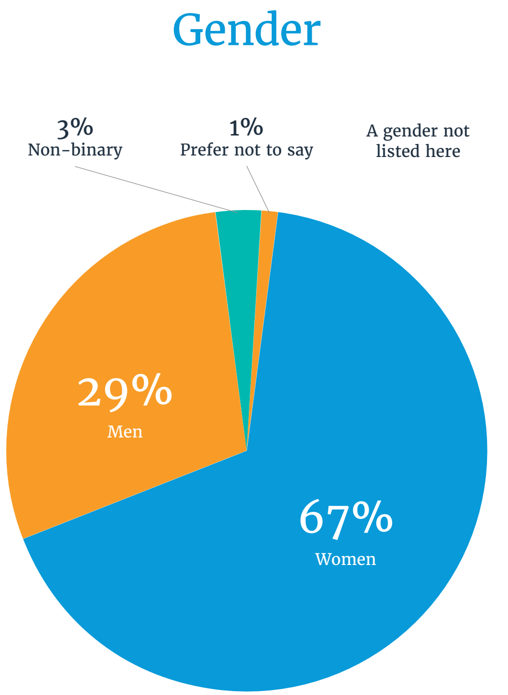


Figure 43: Number of Workers by Highest Level of Education

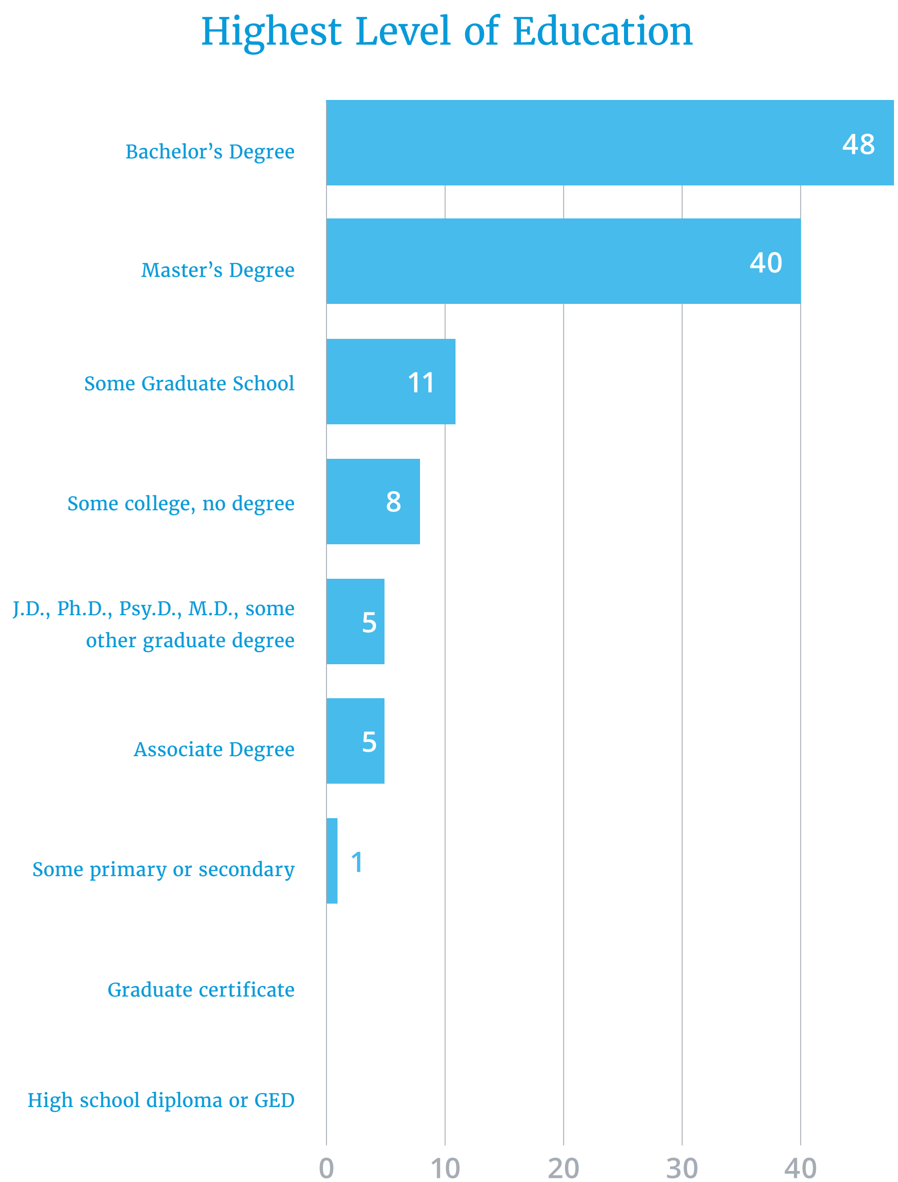
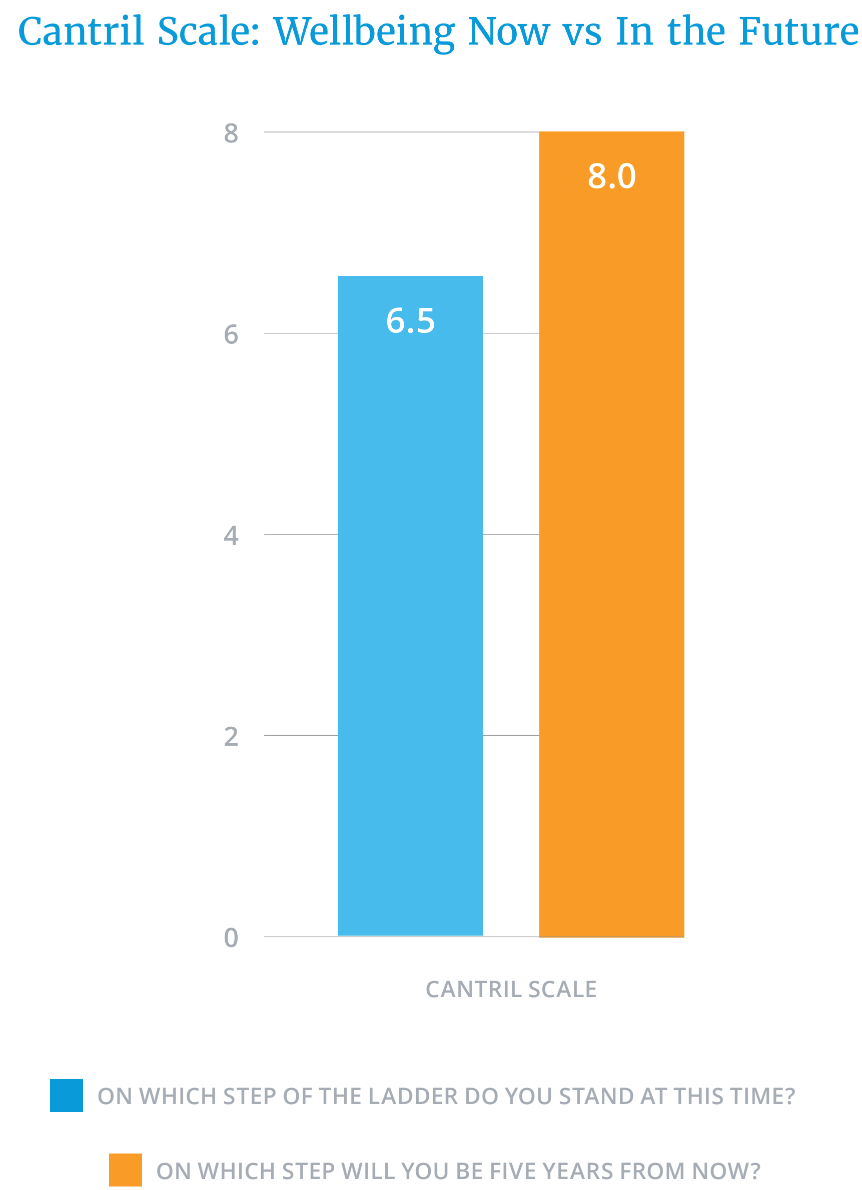


Figure 44: Cantril Scale, Worker Opinions and Expectations about Wellbeing



Workers

Creative workers cited the costs of living and working, jobs, business development gaps, their contributions not being fully recognized, and silos within creative industries as challenges to being a creative worker in San Diego. The pandemic was brought up minimally, around the topics of government regulations and of audiences reluctant to go back to pre-Covid activities. For most respondents, workers and employers, Covid challenges were not a priority.

Regardless of the challenges, over 80% of worker respondents were satisfied with their jobs, which we can see in the creative occupations turnover[27] and replacement rates data.[28] Turnover in creative occupations is 23%, significantly low compared to 45% turnover across the County, and the annual replacement rate for creative occupations is 9%, compared to the County's 11%.

27 Turnover rate gives context for how often employees in a given occupation are moving to different employers. Lightcast Glossary: https://kb.emsidata.com/developer/glossary/#r

28 Replacements are jobs that will need to be filled by new hires due to existing workers leaving the occupation. Lightcast Glossary: https://kb.emsidata.com/developer/glossary/#r

Cost of Living and Working

Respondents consistently said that the pay for artists in San Diego does not cover the cost of living. When talking about cost of living, they cited the costs of housing, studio space, utilities, health care, insurance, dependent care, taxes, gas, groceries, tuition, and retirement. Several mentioned the difficulty of working short-term or part-time, especially covering their bills with inconsistent revenue streams and the lack of fringe benefits, like health insurance and retirement plans. Many respondents said that they needed to take on side hustles and other part-time jobs to make ends meet, limiting the time and energy available for their creative work, training, or growing their careers.

"Cost of living is the number one issue for creative professionals, especially would be creative business-owners. Access to affordable housing and workspace is abysmal and why we see a constant brain drain out of our city – there are neither affordable housing nor professional opportunities that can sustain retaining creative talent in our community."

Jobs

Respondents described lack of demand in their creative fields, including university art instruction, public art, the built environment, film, design, and fashion. Many said they had a hard time finding an audience willing to pay for their work. When discussing job or sales opportunities, respondents compared San Diego to New York City and Los Angeles, or to cities where they have previously lived. Some respondents mentioned audiences having “covid fears,” preventing them from attending events that might generate more jobs for artists.

“San Diego is a great place to paint, but has a below average audience for buying original art.”

“I rate San Diego as less than ideal for number of artists, galleries, jobs, artist communities, and cultural events. If I were a young artist looking to find a city in which to settle after college, I would probably head to a cheaper city OR a big city with more to offer like LA or NYC.”

Business Development

Creative workers said they found the non-creative aspects of working in the creative economy to be difficult. They mentioned difficulty with promotion, contracting, employee retention, recruiting part-time help, taxes, and business development programs that understand the creative economy. More than one respondent mentioned that a film commission could lure film production to San Diego. One respondent indicated that they were “spending more time hustling for new clients than doing the actual creative work.” Regulations were a challenge for many, including regulations around freelancing, regulations closing venues, and changing COVID restrictions and regulations.

Contributions Not Being Fully Recognized

Respondents felt that their work was underappreciated by potential investors, institutional stakeholders, and, for those working for an employer, by the non-creative leadership in their company. They frequently mentioned a norm of expecting creatives to work for small stipends or for free. Some respondents mentioned that people don't see their profession as important, don't respect professional boundaries, or treat them as gig workers instead of business owners.

> *"[San Diego needs] investment at a foundational level in resources for cultural organizations – nonprofit as well as for profit businesses; this includes training, tax benefits, access to affordable live work space, and a true focus on cultivation pipeline development."*

One way to address this issue would be to provide more support programs that connect creatives to financial and creative support for their projects. Programs for financial support could include project markets, pitch forums, and investor programs. Programs for creative support could include fellowships and artist residencies.

Silos

Many creative respondents felt a lack of peer connections in San Diego creative industries. They described widespread desire to be more connected to their peers and would be interested in professional opportunities to network across the county, across industries, and over the border. They cited a desire for networking and the ability to organize and advocate for their sectors.

Respondents were asked whether they were a part of a professional organization. For those who said they were not, we asked why not. At least some of the problems are lack of awareness: many respondents indicated that they didn't know whether there were any associations relevant to their work, didn't know where to start in finding one, or have not been asked to join. Some respondents believed that these groups were too expensive, too time-consuming, or not useful to them. The most common response to this question was some version of "I don't feel like any of these groups are for me."

A number of respondents expressed that they would like better relationships with their peers but are not aware of the existence of or benefits to relevant creative professional opportunities in the area.

Employers

Employers commonly cited concerns about the regulations and cost of doing business, cost of living as it pertains to talent retention, funding and resources, and physical infrastructure.

Regulations as they Impact the Cost of Doing Business

When survey respondents expressed challenges with regulations, they usually mentioned regulations generally (for example, “government regulations,” or “state regulations”). They described regulations making it more difficult to acquire building permits, execute events, and access resources. California Assembly Bill 5 (AB5)[29] was frequently mentioned specifically, noting that the payroll and compliance work it requires increased the cost of doing business.

“We’ve gone from 1 employee to 21 part-time temporary employees in one year due to AB5. 90% of those employees are only working a few months of the year . . . We are now responsible for HR compliance for companies with 20 or more employees. With so little operating support, AB5 may run our organization into the ground if we don’t charge more for our services to cover overhead.”

One possible way of addressing regulations that increase the costs for business owners could be to provide incentives to attract and retain creative businesses in our region.

29 https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB5

Cost of Living Impacting Talent Retention

Many employers echoed the concerns of employees in our survey who felt they could not afford to live in San Diego long-term. They noted that it was difficult to hire and retain qualified talent when the cost of living, especially housing, is high here relative to other places.

“Keeping qualified teaching artists in an expensive city.”

“Cost of housing makes it hard for young professionals to stay. They are here 20s and 30s and then go to have kids.”

Resources

Employers cited the level and sources of resources as challenges for their business. They noted that the process of applying for grants and contracts was cumbersome, and that their capacity has reduced as administrators have been redirected to human resources tasks as a result of AB5. Respondents wanted to see more funding from government and corporations.

'Corporations. . . could DO MORE for the arts, including the gigantic hospital complexes who deal with large professional mass-produced arts suppliers. [They] should be part of economic development efforts. Many of the organizations based here could . . . establish 'cultural community coordinators.' That would boost the economic and cultural richness of San Diego."

Physical Infrastructure and Affordability

Employers described a desire for affordable and accessible physical infrastructure. Many respondents cited the high costs for renting office, co-working, meeting areas and spaces for social and networking events as well as space for exhibition, production, and practice.

"Rental costs for studio/gallery/exhibition space are exorbitant. Little can grow like this, at least in the visual arts, without selling its soul."

In San Diego, affordability of space is a broader issue that does not exclusively impact the Creative Economy. San Diego could attract and keep more companies if the cost of living were sufficiently low or if creative sector jobs grew enough to meet supply of workers. We need to address business incentives and affordability concerns through strategic, collective work. To address the lack of space and community, there could be greater planning towards creating more creative spaces and districts where multiple creatives could thrive.

COVID findings

Pandemic Job Growth

In 2020, creative economy industries took a big hit. How did job growth change during the COVID-19 pandemic years? Analyzing pre-pandemic 2019 to 2022 jobs numbers, self-employed jobs grew substantially more than employer jobs. Employee jobs grew by 1.3%, while self-employed jobs grew by 2.1% across all creative industries.

As we have seen before, job availability was a big concern for most creative workers, and the data shows that over the past 10 years self-employment jobs have grown much faster (25%) than non-self-employment jobs (5%). We can see that this trend continued throughout the pandemic years. Although for most industries, this meant slower job growth for employed creatives than for self-employed creatives, some industries showed a decrease in employment growth and a substantial increase in self-employment growth, including Events, Entertainment, and Printing and Publishing. In our survey, very few respondents mentioned COVID as a top concern:

"You need to be an independent artist + entrepreneur and create your own art "business" in order to succeed in San Diego." – survey respondent.

The industry groups that saw the largest self-employment job decreases were Fine Arts Schools, Museums, and Architecture and Interior Design. The industry groups that saw the largest employee increases were Fine Arts Schools, Communication Arts, and Digital Media.

If we analyze creative occupations instead of industries, we see different trends on self-employment job growth. Here, creative occupation employer jobs grew by almost 10%, while self-employed jobs actually decreased by 0.2%.

The hardest-hit occupation groups for self-employment were Education, Training, & Library, followed by Architecture & Engineering, and Computer occupations. These occupations align with the industries that were hardest hit during COVID, namely Fine Arts Schools, Museums, and Architecture and Interior Design industries. The occupation that grew the most in self-employment was Managers (7%), and in employment was Business and Financial Operations (79%).

Table 14: Industry Employed vs. Self-employed Job Trends, COVID19 impact

	Employed 2019	Employed 2022	Emp Change 2019-2022	Self-Employed 2019	Self-Employed 2022	Self-Emp Change 2019-2022
Creative Economy	39194	39708	1.3%	43071	43970	2.1%
Fashion	1605	1835	14.3%	951	1368	43.8%
Digital Media	5083	5999	18.0%	923	990	7.2%
Events	3126	3098	-0.9%	7289	8438	15.8%
Art Dealers	137	144	4.9%	501	545	8.9%
Music	889	914	2.8%	351	389	10.9%
Communication Arts	2759	3281	18.9%	6115	5914	-3.3%
Visual and Performing Arts	2806	3245	15.7%	18127	18191	0.4%
Industrial Design Services	172	180	4.6%	245	236	-3.7%
Architecture and Interior Design	4511	4479	-0.7%	2851	2561	-10.2%
Museums	4627	4391	-5.1%	57	46	-17.9%
Entertainment	5045	4465	-11.5%	2016	2219	10.1%
Publishing and Printing	7296	6216	-14.8%	2371	2768	16.7%
Fine Arts Schools	1137	1460	28.4%	1273	303	-76.2%

Table 15: Occupation Group Employed vs. Self-employed Job Trends, COVID19 Impact

	Employed 2019	Employed 2022	Emp Change 2019-2022	Self-Employed 2019	Self-Employed 2022	Self-Emp Change 2019-2022
Creative Economy Occupations	51605	56692	9.9%	54296	54185	-0.2%
Architecture & Engineering	2985	3111	4.2%	1048	955	-8.9%
Arts, Design, Entertainment & Media	17231	18306	6.2%	43868	43977	0.2%
Business & Financial Operations	138	247	78.5%	508	519	2.0%
Computer	20922	23753	13.5%	3760	3587	-4.6%
Construction & Extraction	1338	1714	28.1%	439	438	-0.2%
Education, Training, & Library	2579	2885	11.8%	352	198	-43.7%
Managers	3985	4484	12.5%	1639	1758	7.3%
Production	2427	2191	-9.7%	2682	2752	2.6%

Future Outlook on Job Growth Disruption

Are the industries that are suffering right now more susceptible to job loss in the near future? To try to answer this question, we can see their expected job growth over the next 2 years. For the freelance industries that were hardest hit during the pandemic, Fine Arts Schools' jobs are expected to have the biggest decline (35%) with a job loss of 105 jobs, while next 2 most concerning industries are expected to continue losing jobs but at a slower pace.

Looking at the occupations that were hardest hit between 2019 and 2022, we can see that Education, Training, & Library occupations and Computer occupations are expected to grow over the next few years, while Architecture & Engineering is expected to continue losing self-employment jobs, with an expected job loss of 2%.

Table 16: Industry Group Self-Employed Future Job Trends, COVID19 Impact

	Self-Employed 2022	Self-Employed 2024	Self-Emp Change 2022-2024
Fine Arts Schools	303.0	198.0	-34.6%
Museums	46.5	45.9	-1.2%
Architecture and Interior Design	2560.8	2514.9	-1.8%

Table 17: Occupation Group Self-Employed Future Job Trends, COVID19 Impact

	Self-Employed 2022	Self-Employed 2024	Self-Emp Change 2022-2024
Education, Training, & Library	198.1	206.5	4.3%
Architecture & Engineering	954.9	933.5	-2.2%
Computer	3587.3	3876.3	8.1%

Conclusions and Recommendations

Recommendations

To fully capitalize on San Diego's creative and economic potential, individuals and organizations must come together – both within and across industries and sectors – to address challenges and build more sustainable, inclusive, and prosperous creative industries in the region. The report found that although there are challenges, San Diego's creative economy is one of growing potential, waiting to be tapped. The following recommendations were written in partnership with the City of San Diego Commission for Arts and Culture.

Strategic Integration

The Creative Economy needs to be collectively integrated into regional strategic growth areas of organizations like the EDC, Workforce Partnership, and Chamber of Commerce. The City of San Diego's Economic Development Strategy[30] includes expanding job opportunities and supporting workers prepare for and secure jobs, as well as supporting small and local businesses with technical and financial assistance. The Creative Economy, comprised almost completely of small businesses, should be a part of the conversation when talking about economic and support strategies.

Foster Equitable Representation

Creative workers are not representative of the County population in gender and race. We have found racial disparities are especially salient in management and employer positions than in employees and self-employed individuals. Leadership and hiring initiatives, and support with creative career pathways could improve representation where it is most needed.

Leverage Strengths in Existing Creative Industries and Innovation Economy

Local government can step in to foster partnerships, build a commercial sector strategy, and provide business development training to creatives who may need it. This kind of support from local government could help meet the needs of survey respondents who cited difficulty with business development, contracting, and other commercial strategic or tactical concerns.

Workers highlighted a lack of community or networking opportunities. When asked about joining professional organizations, they cited costs and noted that it was challenging especially for inter- and multi-disciplinary artists to decide whether and which professional organizations to join. Organizations and existing communities can clarify who qualifies for membership and what the benefits of membership are. They could offer events and financial incentives to cover the costs of membership to prospective members to expand their reach and create more community connections in their domain.

Build Physical Infrastructure

Be it for team and individual work or for showcasing and selling their products and services, creatives need permanent, dedicated, and

30 https://www.sandiego.gov/economic-development/edstrategy

affordable space. One way to address this is by securing space through public-private partnerships and exploring the possibility of repurposing existing buildings.

Both workers and employers expressed concerns about the lack of gallery and event space. To intervene effectively, it would be useful to know more about this problem: is it a lack of affordable space? A lack of space at all price points? Lack of space in certain areas of the county? A lack of awareness about existing space? Each of these patterns would suggest a different focus for our solution of providing physical infrastructure for creatives.

Business Incentives

Because of the high cost of living and costly regulations for business, we should look into the possibility of providing business incentives for new businesses to relocate and stay in San Diego, as well as for current San Diego small creative businesses to continue operating. Possibilities include business relocation incentives, advocacy/coalition building, and repackaging existing business programs[31] for creatives. Supporting our small business owners with managing the high and rising business costs will also help demonstrate to our creatives that they are valued, and that their contributions are important to San Diego.

One of the main concerns for creative workers is the lack of stable employment. If we can provide companies the resources and the support they need to grow and create new jobs, creatives who would rather not be business owners or self-employed individuals would greatly benefit from stable employment and a stable income that allows them to reliably budget for their necessities.

Create Support Programs

Support programs for creatives should encompass financial, business, and creative support. Some possibilities include investor programs, development programs, business development, grant programs, and general networking opportunities. The overwhelming majority (96.6%) of businesses in these industries have fewer than 50 workers. Governments can collaborate with small business support services to increase awareness of their existing programs, like the City's online Learning Center for small businesses[32] and consulting services for small businesses,[33] and adapting their programming for creatives.

For those creatives who choose self-employment, survey respondents indicated a desire for business development support tailored for the needs of the creative industry but didn't get specific about their needs. An interview study focused on answering the questions, "What business development support do creative businesses and workers need?" and "what unique features of creative work are not being supported in current services?" could be a positive next step.

31 https://www.sandiego.gov/business-resources

32 https://www.sandiego.gov/business-resource/learning-center

33 https://www.sandiego.gov/business-resource/small-business-consulting-services

Retain and Diversify San Diego's Talent

There are multiple ways of addressing the question of how we retain creative talent, and how do we create a more diverse creative workforce, in San Diego. To encourage people from a range of backgrounds to join creative industries, one recommendation is to create pathways people can see and follow. This includes including art as a career in curriculum on k-12 education and in higher education. Paid internships and apprenticeships are accessible ways for individuals to join the industry. And it is just as critical to support those who are already in a creative industry or occupation and may need extra training by providing the resources necessary for them to learn new skills related to their occupation and those related to business ownership.

Unsustainable pay, high cost of living, and a lack of stable employment are the biggest concerns that turn talent away from San Diego. Addressing affordability issues and supporting the growth of our small businesses will need to be a Collective focus if we want to retain workers.

Increase San Diego's Creative Industries' Visibility Locally and Globally

One way to address the lack of creative job opportunities, and the lack of demand for paid creative services, could be through engaging in cross-industry programs, marketing campaigns, and highlighting local creative production and global trade where applicable.

Currently, various online and print publications highlight San Diego's creative industries. San Diego has also drawn global attention thanks to its designation as World Design Capital 2024 and could use this moment to prioritize local and global campaigns that highlight different industries within the Creative Economy, including storytelling campaigns about creatives, creative businesses, and creative products and trade across industries.

Conclusions

For the most part, the Creative Economy has bounced back from pandemic-induced economic and job losses. However, the Creative Economy as a proportion of San Diego's regional economy has been steadily shrinking over the past 10 years, hitting its lowest point in 2021 before bouncing back to 2019 levels in 2022. Digital Media, while not the sector with the most jobs, has emerged as a leader in terms of its economic contribution to the region and has experienced substantial growth. Creative occupations within Business and Financial Operations have experienced the most job growth among occupation groups.

Self-employment jobs in the creative industries have grown by 25% over the past 10 years, compared to 5% for employment jobs, indicating a concerning lack of stable employment which creatives mentioned in their responses to our survey. Over 80% of creative businesses are small businesses with less than 20 employees, and almost all are for-profit.

Survey findings shed light on various aspects of the creative economy in San Diego. Employers' concerns about government regulations, particularly AB5, and the high cost of living and working space highlight the administrative burdens faced by small businesses. Despite these concerns, employers expressed overall satisfaction with the talent pool and training opportunities available in San Diego and are optimistic about future hiring and potential growth.

For workers, there is a prevalence of non-full-time work arrangements and the associated challenges of limited work opportunities, like the need to be self-employed. Paired with a lack of a cohesive creative community suggests a need for better community-building efforts and more relevant and accessible professional resources for creatives in the region to provide creative, financial, and business support to workers and employers. Efforts should be made to address the concerns raised regarding benefits, pay, and financial difficulties to ensure a sustainable and thriving creative economy in the region. Despite financial concerns, creative workers are generally satisfied with their jobs.

The challenges in recruiting a diverse workforce and the underrepresentation of racial groups in creative industries, especially in leadership, point to the need for initiatives to improve racial representation in San Diego's Creative Economy. Addressing the racial inequality within the Creative Economy should be part of broader efforts to foster a more inclusive and representative San Diego economy.

To foster a thriving creative economy, it is crucial to address the affordability and accessibility of physical infrastructure, provide incentives to grow creative businesses to create sufficient stable work opportunities, review existing regulations that increase costs for business owners, and enhance funding opportunities from both government and corporate sectors. Additionally, there is a need for greater networking and collaboration among creatives to break down silos and foster a sense of community within the industry.

By addressing these concerns collectively and strategically, San Diego has the potential to create an environment where creative workers and businesses can thrive, leading to increased job satisfaction, talent retention, and overall economic and cultural growth in the region.

Appendix A

Creative Industries by Industry Groups

Group	NAICS	Description
Architecture & Interior Design	332323	Ornamental and Architectural Metal Work Manufacturing
Architecture & Interior Design	337212	Custom Architectural Woodwork and Millwork Manufacturing
Architecture & Interior Design	541310	Architectural Services
Architecture & Interior Design	541320	Landscape Architectural Services
Architecture & Interior Design	541340	Drafting Services
Architecture & Interior Design	541410	Interior Design Services
Art Dealers	453920	Art Dealers
Communication Arts	423410	Photographic Equipment and Supplies Merchant Wholesalers
Communication Arts	541430	Graphic Design Services
Communication Arts	541810	Advertising Agencies
Communication Arts	541921	Photography Studios, Portrait
Communication Arts	541922	Commercial Photography
Digital Media	334614	Software and Other Prerecorded Compact Disc, Tape, and Record Reproducing
Digital Media	511210	Software Publishers
Entertainment	339930	Doll, Toy, and Game Manufacturing
Entertainment	512110	Motion Picture and Video Production
Entertainment	512120	Motion Picture and Video Distribution
Entertainment	512131	Motion Picture Theaters (except Drive-Ins)
Entertainment	512132	Drive-In Motion Picture Theaters

Entertainment	512191	Teleproduction and Other Postproduction Services
Entertainment	512199	Other Motion Picture and Video Industries
Entertainment	512240	Sound Recording Studios
Entertainment	515111	Radio Networks
Entertainment	515112	Radio Stations
Entertainment	515120	Television Broadcasting
Entertainment	515210	Cable and Other Subscription Programming
Entertainment	519110	News Syndicates
Entertainment	532282	Video Tape and Disc Rental
Events	531120	Lessors of Nonresidential Buildings (except Miniwarehouses)
Events	561920	Convention and Trade Show Organizers
Fashion	315190	Other Apparel Knitting Mills
Fashion	315210	Cut and Sew Apparel Contractors
Fashion	315220	Men’s and Boys’ Cut and Sew Apparel Manufacturing
Fashion	315240	Women’s, Girls’, and Infants’ Cut and Sew Apparel Manufacturing
Fashion	315280	Other Cut and Sew Apparel Manufacturing
Fashion	315990	Apparel Accessories and Other Apparel Manufacturing
Fashion	316210	Footwear Manufacturing
Fashion	339910	Jewelry and Silverware Manufacturing
Fashion	541490	Other Specialized Design Services
Fine & Performing Art Schools	611610	Fine Arts Schools
Industrial Design Services	541420	Industrial Design Services

Museums	519120	Libraries and Archives
Museums	712110	Museums
Museums	712120	Historical Sites
Museums	712130	Zoos and Botanical Gardens
Museums	712190	Nature Parks and Other Similar Institutions
Music	339992	Musical Instrument Manufacturing
Music	451140	Musical Instrument and Supplies Stores
Music	512250	Record Production and Distribution
Music	512290	Other Sound Recording Industries
Publishing & Printing	323111	Commercial Printing (except Screen and Books)
Publishing & Printing	323113	Commercial Screen Printing
Publishing & Printing	323117	Books Printing
Publishing & Printing	323120	Support Activities for Printing
Publishing & Printing	424920	Book, Periodical, and Newspaper Merchant Wholesalers
Publishing & Printing	451211	Book Stores
Publishing & Printing	511110	Newspaper Publishers
Publishing & Printing	511120	Periodical Publishers
Publishing & Printing	511130	Book Publishers
Publishing & Printing	511191	Greeting Card Publishers
Publishing & Printing	511199	All Other Publishers
Publishing & Printing	512230	Music Publishers
Publishing & Printing	519130	Internet Publishing and Broadcasting and Web Search Portals

Visual & Performing Arts	711110	Theater Companies and Dinner Theaters
Visual & Performing Arts	711120	Dance Companies
Visual & Performing Arts	711130	Musical Groups and Artists
Visual & Performing Arts	711190	Other Performing Arts Companies
Visual & Performing Arts	711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
Visual & Performing Arts	711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
Visual & Performing Arts	711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
Visual & Performing Arts	711510	Independent Artists, Writers, and Performers

Creative Occupations by Occupation Groups

Group	Occupation
Managers	Marketing Managers
Managers	Public Relations Managers
Managers	Advertising and Promotions Managers
Managers	Fundraising Managers
Architecture & Engineering	Architectural and Civil Drafters
Architecture & Engineering	Architects, Except Landscape and Naval
Architecture & Engineering	Landscape Architects
Architecture & Engineering	Cartographers and Photogrammetrists
Computer	Software Developers
Computer	Computer Programmers

Computer	Web Developers
Computer	Web and Digital Interface Designers
Education, Training, & Library	Librarians and Media Collections Specialists
Education, Training, & Library	Library Technicians
Education, Training, & Library	Anthropologists and Archeologists
Education, Training, & Library	Historians
Education, Training, & Library	Curators
Education, Training, & Library	Archivists
Education, Training, & Library	Museum Technicians and Conservators
Production	Jewelers and Precious Stone and Metal Workers
Production	Shoe and Leather Workers and Repairers
Production	Sewers, Hand
Production	Cabinetmakers and Bench Carpenters
Production	Tailors, Dressmakers, and Custom Sewers
Production	Molders, Shapers, and Casters, Except Metal and Plastic
Production	Photographic Process Workers and Processing Machine Operators
Production	Furniture Finishers
Production	Painting, Coating, and Decorating Workers
Production	Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders
Production	Etchers and Engravers
Production	Fabric and Apparel Patternmakers
Production	Model Makers, Wood

Construction & Extraction	Tile and Stone Setters
Construction & Extraction	Plasterers and Stucco Masons
Business & Financial Operations	Agents and Business Managers of Artists, Performers, and Athletes
Arts, Design, Entertainment & Media	Graphic Designers
Arts, Design, Entertainment & Media	Public Relations Specialists
Arts, Design, Entertainment & Media	Musicians and Singers
Arts, Design, Entertainment & Media	Photographers
Arts, Design, Entertainment & Media	Writers and Authors
Arts, Design, Entertainment & Media	Interior Designers
Arts, Design, Entertainment & Media	Audio and Video Technicians
Arts, Design, Entertainment & Media	Editors
Arts, Design, Entertainment & Media	Producers and Directors
Arts, Design, Entertainment & Media	Actors
Arts, Design, Entertainment & Media	Fine Artists, Including Painters, Sculptors, and Illustrators
Arts, Design, Entertainment & Media	Floral Designers
Arts, Design, Entertainment & Media	Special Effects Artists and Animators
Arts, Design, Entertainment & Media	Technical Writers
Arts, Design, Entertainment & Media	Commercial and Industrial Designers
Arts, Design, Entertainment & Media	Music Directors and Composers
Arts, Design, Entertainment & Media	Entertainers and Performers, Sports and Related Workers, All Other
Arts, Design, Entertainment & Media	Media and Communication Workers, All Other
Arts, Design, Entertainment & Media	Merchandise Displayers and Window Trimmers

Arts, Design, Entertainment & Media	Art Directors
Arts, Design, Entertainment & Media	Craft Artists
Arts, Design, Entertainment & Media	Media and Communication Equipment Workers, All Other
Arts, Design, Entertainment & Media	Film and Video Editors
Arts, Design, Entertainment & Media	Broadcast Technicians
Arts, Design, Entertainment & Media	News Analysts, Reporters, and Journalists
Arts, Design, Entertainment & Media	Fashion Designers
Arts, Design, Entertainment & Media	Sound Engineering Technicians
Arts, Design, Entertainment & Media	Designers, All Other
Arts, Design, Entertainment & Media	Camera Operators, Television, Video, and Film
Arts, Design, Entertainment & Media	Set and Exhibit Designers
Arts, Design, Entertainment & Media	Musical Instrument Repairers and Tuners
Arts, Design, Entertainment & Media	Desktop Publishers
Arts, Design, Entertainment & Media	Costume Attendants
Arts, Design, Entertainment & Media	Artists and Related Workers, All Other
Arts, Design, Entertainment & Media	Dancers
Arts, Design, Entertainment & Media	Choreographers
Arts, Design, Entertainment & Media	Makeup Artists, Theatrical and Performance
Arts, Design, Entertainment & Media	Camera and Photographic Equipment Repairers
Arts, Design, Entertainment & Media	Communications Equipment Operators, All Other
Arts, Design, Entertainment & Media	Broadcast Announcers and Radio Disc Jockeys
Arts, Design, Entertainment & Media	Motion Picture Projectionists