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IN COLLABORATION WITH CREATIVE ALLIANCE MILWAUKEE, AUGUST 2013

AMERICA'S CREATIVE ECONOMY

A STUDY OF RECENT CONCEPTIONS, DEFINITIONS, AND APPROACHES TO MEASUREMENT ACROSS THE USA

A Report from the Creative Economy Coalition (CEC),
a Working Group of the National Creativity Network

Oklahoma City, OK: National Creativity Network
in collaboration with Creative Alliance Milwaukee,
August 2013



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ACKNOWLEDGEMENTS

The National Endowment for the Arts
is the primary funder for this research project.



ART WORKS.

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With additional funding from:



Americans for the Arts
www.americansforthearts.org



Maine Center for Creativity
www.mainecenterforcreativity.org



Massachusetts Executive Office
of Housing and Economic Development
www.mass.gov/hed/economic/industries/creative/createmass.html



North Carolina Arts Council
www.ncarts.org



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www.southarts.org



Cover and Report Design by:
Marian Monsen Creative
Marian Bell, Creative Direction
Jake Stephenson, Graphic Design
www.MarianMonsenCreative.com



WESTAF
www.westaf.org



Wisconsin Economic Development Corporation
www.inwisconsin.com

The Creative Economy Coalition gratefully
acknowledges the following individuals for their
extensive research and administrative support:
Andrew Altsman, Amanda Emma, and
Megan Taylor.



AMERICA'S CREATIVE ECONOMY

ACKNOWLEDGEMENTS

CEC National Research Advisory Council

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The Executive Summary and
Full Report is available at
www.nationalcreativitynetwork.org

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EXECUTIVE SUMMARY

The Creative Economy Coalition or CEC, a Working Group of the National Creativity Network, decided to inaugurate a project that directly led to the creation of this report. As organizations charged with responsibility for serving the creative economy in their respective regions came together starting in 2010 to discuss common issues, challenges and opportunities, they increasingly found it difficult to share a common language around both definition and measurement.

This research project was designed to profile and analyze how the creative economy is currently being defined, segmented and quantified throughout the United States of America. We assessed what we can learn from aggregating creative economy profiles, and whether there is the possibility of producing a 'core' national profile definition and accompanying data descriptors.

The following research questions were posed:

1) How are 'creative economy/industries' currently being defined around the United States by those entities that have articulated a mission to serve the creative industries? The words creative economy/industries are used together because this nomenclature is used interchangeably across the country. This report gives an overview of the written definitions being used for the creative economy as well as the actual descriptors and datasets used to measure them.

2) What position and value do nonprofit arts organizations have in this profiling, and how are they being impacted by the creative economy? Whether organizations which have produced a creative economy profile did or did not address the nonprofit arts sector directly was unknown until the information was collected and collated. Therefore, it was unclear whether or not this question could be answered from this research.

RESEARCH METHODOLOGY

The research questions were purposely designed to locate and analyze creative economy/industries profiling from those organizations that had articulated a mission to serve their creative communities. Study inclusion criteria required that the research be already completed and available in a published report, rather than any work in progress. The research team focused on how the profiling in the respective report could be useful in supporting and growing local creative economy clusters. We were therefore primarily interested in the utility and applicability of the approaches used rather than a more theoretically grounded academic analysis. The primary audiences for our study were persons and organizations responsible for measuring and advancing the creative economy. A total of 27 reports became the research corpus for this study. Reports used in the study met the following criteria:

- defined, segmented and economically quantified the creative industries and/or creative occupations in a specific city, state or region;
- populated their creative economy profile with reputable secondary data; and
- defined the "creative economy" as inclusive of at least two of the following three categories: for-profit creative service businesses, nonprofit arts groups, and independent creative businesses (e.g., self-employed, so-called "creatives").



◀ Sir Ken Robinson facilitates a student session at State of Creativity Forum, 2012; photo courtesy of Creative Oklahoma.

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How are 'creative economy/industries' currently being defined around the United States by those entities that have articulated a mission to serve the creative industries?

The following research questions were posed:

2

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EXECUTIVE SUMMARY

A DEFINITIONAL CONTEXT

Since its inception as a term, the creative economy and its sibling, "creative industries," has generated an enormous body of literature worldwide that includes extensive discussion of definitions, purpose, philosophy, measurement, impact, utility, and history. Six distinct models worldwide represent the major ways people have conceptualized the creative economy. There remain deep divides among informed persons about who or what is entailed in the concept of the creative economy, whether such a concept is viable and useful, the degree to which it reflects particular philosophical, political, and value positions, how it relates more broadly to the economy, human societies and cultures, as well as how it relates to non- or less-creative elements.

The 27 documents that comprise our study sample amply demonstrate that organizations and regions within the United States, like their counterparts worldwide, come at this task of definition and measurement with quite different ideas about what constitutes creativity, the means by which it can be identified, where it can be found, and exactly what elements, specific actions, behaviors, jobs, and professions lie within its boundaries.

Across the documents there seems to be reasonably strong congruence around the idea that the creative economy involves both individuals and entities who engage in activities that add value to society in one or more ways through the provision of goods and/or services that are inextricably linked to human creativity manifesting itself in one or more dimensions throughout the process of ideation, creation, production, distribution, and use.

Commercial photographer
Chuy Benitez; photo courtesy
of Houston Arts Alliance.

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EXECUTIVE SUMMARY

PARTICIPANT PROFILE

The documents we obtained for this study are not a random sample. They represent complete data for one or more years between 2003–2012 from 20 states plus 15 regions and the District of Columbia. In all, 28 non-duplicated states were represented in the research, in whole or in part. Some states participated in regional studies in addition to their own statewide efforts.



THE MAIN STUDY RESULTS

All but one of the participants used some combination of the North American Industry Classification System (NAICS) and the Standard Occupational Classification (SOC) systems. Separate analyses were produced for both NAICS and SOC systems.

A total of 264 NAICS codes were represented within their aggregate creative economy profiles. Seventy codes were common to 50% or more of the reports indicating that their community had a business that would be classified under those respective NAICS codes. These 70 codes represent 26% of all codes used by the 25 reports that used NAICS codes. Thirty-nine NAICS codes were common to 75% or more of the reports. These 39 codes represent 15% of all of the NAICS codes found in our sample. The reduction of codes from 70 to 39 between the 50% and 75% or more designations is spread proportionately throughout with no marked differences. The industry categories that are the most common are:

- Advertising
- Architectural and related
- Culture and heritage, including libraries
- Design
- Film, video and sound
- Independent artists
- Internet broadcasting and publishing
- Music production, distribution and sales
- Performing arts and entertainment
- Printing and publishing
- Television and radio

◀ Student painter; photo courtesy of Montserrat College of Art in Massachusetts.



^ Derek Thompson with WALL-E; Thompson is a Pixar storyboard artist and alumnus of Otis College of Art and Design in Los Angeles.

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ONLY FOUR NAICS CODES WERE SELECTED BY ALL REPORTS:

- 541410 Interior Design Services
- 541430 Graphic Design Services
- 711110 Theatre Companies and Dinner Theaters
- 711130 Musical Groups and Artists





EXECUTIVE SUMMARY

THE MAIN STUDY RESULTS (CONTINUED)

Only four NAICS codes were selected by all reports:

- 541410 Interior Design Services
- 541430 Graphic Design Services
- 711110 Theatre Companies and Dinner Theaters
- 711130 Musical Groups and Artists

Thirteen NAICS codes were used by 24 or more of the 25 reports; i.e., all or virtually all participants. Nine of these 13 additional codes add the motion picture and sound recording categories to the design and performing arts categories used by all reports.

Our research suggests that the 39 NAICS codes used by 75% or more of the reports (i.e., 18 or more of the 25) could be considered a strong concurrence set of NAICS codes, while the additional 31 codes used when looking at the 50% or more designation (i.e., 13 or more of the 25 reports) could be considered a moderate concurrence set of NAICS codes. Both sets would be worthy candidates for inclusion within a national definition of a creative economy data set.

Seventeen reports used the Standard Occupational Classification (SOC) system to classify workers into occupational categories employing a total of 187 SOC codes. Forty-seven codes were common to 50% or more of the reports reflecting that their community had a business that would be classified under the selected SOC codes. These 47 codes represent 25% of all codes used within the reports. There are 8 occupational categories represented at 50% or more and 7 occupational categories represented at 75% or more of the reports.

The 16 codes represented by 60% or more of the geopolitical units (represented in 3 or 4 of the participant types) are:

- Actors
- Architects, except landscape
- Art directors
- Choreographers
- Commercial and industrial designers **
- Craft artists
- Fashion designers
- Fine artists **
- Graphic designers
- Interior designers
- Landscape architects
- Multi-media artists and animators
- Music directors and composers
- Producers and directors
- Set and exhibit designers
- Writers and authors

This research suggests that the 35 codes used by 75% or more of the participants (i.e., 12 or more of the 17 reports) could be considered the strong concurrence set of SOC codes while the additional 13 codes used when looking at 50% or more of the participants (i.e., 8 or more of the 16 reports) could be considered a moderate concurrence set of additional SOC codes. Both sets of SOC codes would be worthy candidates for inclusion within a national definition of a creative economy data set.

** Codes used by ALL reports

Our research suggests that the 39 NAICS codes used by 75% or more of the reports (i.e., 18 or more of the 25) could be considered a strong concurrence set of NAICS codes.

Work displayed at designer Suzanne Perron's store in the Magazine Street Cultural District of New Orleans; photo courtesy of Louisiana Department of Culture, Recreation, and Tourism.





EXECUTIVE SUMMARY

OTHER TOPICS EXPLORED

The role of geographic size and location, industry segmentation and the ways in which nonprofit arts are included in studies of the creative economy throughout the USA were explored. Our study described the major features, similarities, and differences between the approaches of the Americans for the Arts national data programs and the Creative Vitality Index of Western States Arts Federation (WESTAF). We also considered the relationship between the creative placemaking and the creative economy movements.

CONCLUSIONS AND RECOMMENDATIONS

The reports and organizations behind them indicate quite clearly that they:

- are looking at the bigger picture of collaborating and connecting across their nonprofit and for profit sectors
 - respect and value their national colleagues in this area; many reached out to understand what others had done and asked consultants for comparable community data
 - want to embrace their creative assets and ground their efforts in the local economic context; an effort viewed as considerably more important than academic understanding or international comparison
 - realize that time is of the essence as they grapple with positioning their creative assets as a sustainable, measurable, and relevant contributor to growing their respective communities
- The participants in this study came into this research wanting a measurable, practical understanding of the value of their creative businesses and workforce so that they could communicate a cohesive economic message to their community. Some specific conclusions include:
- Among the participants, there is a sense of shared purpose in understanding the economic value of profiling their creative economies and participating in this national creative economy research.
 - Participants were not primarily interested in a national or international literature review of creative economy/industry definitions, but rather, describing their local economic picture.
 - A case for a national data-based definition of the creative economy can begin to be constructed.
 - A case for the language-based definition is more challenging because of the wide variety of definitions across participants and more research would be helpful.
 - More data review and research must be done to understand the full picture of the nonprofit arts within the creative economic analysis.
 - All participants were using their studies to advocate for and enhance the awareness of the value of the creative economy as well as coordinate and strengthen support for the creative industries.
 - This research will be useful to any consultant or researcher in this field.

Industrial Design is evident in Art All Around®, a creative place-making project to transform oil tanks in the Portland harbor; photo courtesy of Maine Center for Creativity.



Volunteer leaders of the award-winning Art All Around® project at Sprague oil tanks. Photo by Matthew Robbins; photo courtesy of Maine Center for Creativity.





EXECUTIVE SUMMARY

CONCLUSIONS AND RECOMMENDATIONS (CONTINUED)

It will be important to support multi-agency briefings on the findings of this research. The opportunity for broad understanding of the economic and community development potential of this work is significant. Suggested recommendations as next steps are:

- Convene the practitioners, consultants and researchers to discuss these findings, the criteria for common ground, and how this work can better inform the growth of the creative economy sector.
- Agree upon a preliminary set of core common metrics for the purpose of moving the conversation forward.
- Develop a model(s) of the US creative economy in relation to the best and most recent international research.
- Enter into conversations with national economic policymaking and research bodies that will lead to a large-scale study of the creative economy across the US by well-regarded economists that have no direct involvement with creative industries and arts bodies in order to provide a more dispassionate and rigorous portrait that can be the basis for further work on the part of policy makers, funders, advocates, researchers, and practitioners.
- Commission further research on understanding the full picture of the nonprofit arts within the creative economy analysis.

As the first national inventory and profile of how the creative economy is being defined by organizations that serve these industries, this research has yielded productive information both for organizations who serve the creative industries as well as those who support and execute research in the field. This work has produced a reasonable sample size of participant experiences, and a robust data definition based on the almost exclusive use

of the NAICS and SOC data sets. The research revealed a solid understanding of how and why these organizations undertook these profiles, and some perspective on what their next steps were in terms of supporting their creative industries. With this information a core national definition could be considered, and the organizations and researchers engaged in this work should be convened to discuss the important next steps as outlined above.



^ Cycropia Aerial Dance Company of Madison, Wisconsin; photo courtesy of Wisconsin Arts Board.



^ Award winning Furnishings Designs; photos courtesy of Phillips Collection, High Point, NC.

